



## List of selected value chains and relationship building V1.4 (30th August 2021)

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#### D4.2: List of selected value chains and relationship building

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## List of Acronyms

AB – Agriculture Biologique
AOP -- Appellation D'origine Protégée
CCVD - Communauté de communes du Val de Drôme
CITES – Convention on International Trade in Endangered Species of Wild Fauna and Flora
COP – Community of Practice
DOP – Protected Designation of Origin
EU – European Union
HNV – High Nature Value
IGP – Protected Geographical Indication
IUCN – International Union for Conservation of Nature
LAU – Local Administrative Units
LEADER -- Links between actions for the development of the rural economy
MAP – Multi-Actor Platform
MOVING – Mountain Valorisation through Interconnectedness and Green Growth
MRL – Mountain Reference Landscape
MRR – Mountain Reference Region
NGO – Non-Governmental Organisation
NUTS – Nomenclature of Units for Territorial Statistics
PDO – Protected Designation of Origin
PGI – Protected Geographical Indication
pSCI – Proposed Site of Community Importance
SDG – Sustainable Development Goals
SES – Socio- Ecological Systems
SPA – Special Protection area
UAA – Utilised Agricultural Area
VC – Value Chain



## 1. Summary

This deliverable represents the step in the H2020 MOVING project whereby we identify a starting point for the participatory value chain analysis at the heart of WP4 and the wider project. Regional partners have selected a focal value chain for further in-depth analysis from the wide variety of mountain value chains identified for their mountain reference regions as part of [D4.1](#)<sup>1</sup> (Moretti et al, 2021).

The conceptual and analytical approach taken in the H2020 MOVING project dictates that the focal value chain is a starting point to understand the assemblage of practices, actors and socio-ecological resources in mountain landscapes associated with the focal product from which the analysis begins. Therefore, it may be appropriate to talk about a value web (Block, Thompson et al. 2008, Doliente and Samsatli 2020) or networks to reflect the systemic, complex and dynamic nature of the entity, quite removed from a conventional linear value chain analysis. Furthermore, the intention is to understand and work with these dynamic systems, prioritising a more qualitative analysis of the whole system than an in-depth quantification of any one part of the system.

The deliverable highlights two aspects that will underpin the research over the next 18 months:

- the focal product and associated value chain (to enter the value web); and
- the associated actors involved in, influencing, or affected by, the value chain and wider value web

### 1.1. Types of value chains selected

The focus within the H2020 MOVING project is on value chains, or webs, associated with the natural resources found within the mountain reference landscapes. These landscapes reflect a combination of biophysical factors ('mountains' as defined by EU regulation 1305/2013 art. 32.2 "Areas facing natural constraints - Mountains"); the EEA (2010) and administrative spatial units (LAU1 or LAU2 combinations). Therefore, as illustrated by the contextual information in [D4.1](#) (Moretti et al, 2021), the value chains (VC) selected are not necessarily responsible for the majority of employment or economic value-added in these landscapes. Instead, the focal value chains illustrate how natural resources are enrolled in local valorisation activities; how they contribute to a wider value webs in mountain regions, and to what extent they are tele-coupled with other systems beyond the mountains in each region.

Table 1 illustrates the main types of value chains being investigated in WP4 task 4.3. There is a range of traditional and innovative value chains, with many traditional products associated with retro-innovation (Zagata et al., 2020) such as new cooperatives, or extending value chains from local into international markets. In some cases, the examples include global value chains and involve specifically regulated place-based designations (PGI, PDO) to protect the brand when

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<sup>1</sup>[https://www.moving-h2020.eu/wp-content/uploads/2021/06/D4.1\\_Inventory-of-Mountain-Value-Chains\\_web.pdf](https://www.moving-h2020.eu/wp-content/uploads/2021/06/D4.1_Inventory-of-Mountain-Value-Chains_web.pdf)

competing internationally. In other cases, the examples are niche and consumption is mainly within region. The case study text also illustrates how many of these VCs are linked to other value chains in the value web, including links with rural tourism, knowledge systems, designated species or habitats, (bio)-energy, fabric manufacture and health systems. Unlike the initial D4.1 inventory, the table does not include any value chains products based primarily on wood, water, energy or traditional crafts.

Table 1: Summary of selected Value Chains

<b>Focal Product</b>	<b>Member State and Region</b>	<b>Links to other VCs</b>
<b>Meat (lamb, beef, Iberian ham)</b>	Austria – Weiz Czech Republic Sumava-Cesky Les France – Drome Valley Serbia – Dinaric Mountains Spain – Sierra Morena	Wool fabric, wool insulation, cork production, beef and pork production, cheese production, knowledge and education, conservation, rural tourism
<b>Public goods (biodiversity, agro-ecology)</b>	Bulgaria – Stara Planina Hungary - Barnag	Livestock farming (meat, wool), livestock breeding, knowledge
<b>Crops (Carob, Chestnut flour, olive oil, cereals, tomatoes)</b>	France – Corsica Greece – Crete Central Rethymno Italy – Northern Appenines Spain – Betic system Switzerland – Swiss Alps Turkey - Beydaglari	Pharmaceutical and medical industries, other horticultural production; livestock production, conservation; heritage and plant breeding, tourism
<b>Cheese (sheep, cow)</b>	Italy – Central Appenines Portugal – Cordilheira Central Switzerland - Jura	Tourism, lamb meat, wool production, conservation, nutrition industries
<b>Alcohol (wine, whisky)</b>	Italy – Eastern Alps Portugal – Macico Noroeste Spain - Pyrenees United Kingdom – Speyside, Scotland	Tourism, freshwater fisheries, bio-energy, livestock farming, chestnut and almond production, olive oil production, heritage and conservation.
<b>Tourism</b>	North Macedonia – Maleshevski	Forestry, livestock farming



	Romania – Carpathian Mountains	
<b>Bio-honey</b>	Slovakia – Slovak Mountains	Forestry, livestock farming, education, conservation

## 1.2. Types of stakeholders engaged

Building an EU Community of Practice (COP) is one of the MOVING project’s main objectives, linking the 23 regional multi-actor platforms (MAPs) with an EU multi-actor platform and ensuring that together, knowledge and experience is shared and developed to improve the resilience and sustainability of European mountain areas.

The identification of a focal value chain, therefore, is interlinked with the identification of the main actors, or stakeholders, involved in the value chain. A common typology has been adopted that distinguishes between the main types of actors, from those involved in managing the natural assets that provide inputs to the value chain, through the business and government sectors to include civic society and scientific expertise. There was considerable variation in how similar organisations or individuals were attributed to each category, something that will be further discussed in the Consortium meeting in September 2021.

Within these types, there is a variety of organisations including both hyper-local (a single farm, or factory) and multi-national organisations. In most cases, the contacts are representatives of organisations, which is an effective way to capture the views of an interest group and often reflect actors that are able and willing to attend meetings about research. However, there will be direct contact with individuals living and working in mountain reference landscapes in most cases. These interactions, within WP4 and beyond, will be monitored and evaluated to ensure that the project is supporting the development of the COP.

Table 2: Types of Stakeholders involved in Regional Multi-Actor Platforms

Type	Involved in MAP or in another form in WP4
<b>Producer (farmer, forester, grassland manager)</b>	Associations, unions, cooperative & individual land managers/owners
<b>NGO</b>	Animal welfare, nature/ecological, leisure, education, youth, consumer NGOs
<b>Civil Society</b>	LEADER, rural development organisations, consumer associations, bloggers, museums, education

<b>Innovation broker/advisor</b>	Chamber of agriculture, agricultural skills providers, training colleges, breeders, certification advisers, farmer cooperatives
<b>Business (agricultural)</b>	Fibre and food processors, machinery producers, export associations, breeders
<b>Business (diversified or non-agricultural businesses)</b>	Butchers, brewers, bakeries, farmers market, slaughterhouses, processing units, shops, hunters, tourism providers, retailers, mills, builders, crafters, palliative care providers
<b>Public authority/policy maker</b>	Local, regional, national ministries, national/natural park authorities, chambers of commerce, state agencies
<b>Researcher</b>	State agencies, University, research institutes, agricultural colleges
<b>Other</b>	Forest managers, rangers/guides, Common land associations, Health organisations, cultural associations, certification organisations, tourists

Many (n=9) regional MAPs have already met in some form; but for some cases, the combination of the re-emergence of Covid-19, heatwaves, and peak farming activity means that formal meetings are planned for the autumn. However, contact with the main actors has been made in all cases. In some cases, there is no distinction made between those engaged in the regional MAP and other WP4 activities, but in other cases, there is a core of actors that will be closely involved throughout MOVING and other actors who will be less involved but still important sources of expertise and advice for specific tasks.

Some cases already highlight a specific interest in the gender or age dynamics of the actors involved. As with the choice of value chain, the MAPs will engage actors beyond the narrow value chain to include those that may enable the value chain to develop; and those involved in other value chains that interlink and therefore are central to understanding the dynamics of sustainability and resilience.

### 1.3. Next steps for WP4 (Participatory Value Chain Analysis)

The participatory value chain analysis is important for the aims of the MOVING project:

- Build capacities in the Community of Practice (local, regional, and EU wide) through sharing knowledge and experience
- Understand how value chains contribute to the resilience of mountain areas to climate change and other threats e.g. depopulation
- Identify the socio-ecological factors that shape, and will shape, mountain value chains to 2050
- Identify new or upgraded mountain value chains
- Identify supportive policy design for mountain sustainability and mountain value chains



The next steps are for each value chain to use a combination of desktop and interview-based data collection to identify and describe the main actors, practices and socio-ecological resources underpinning each value chain assemblage, or value web, including ways in which the mountain value chain is tele-coupled with other socio-ecological systems (Task 4.3, Spring 2022). The resulting understanding will be discussed, and a more comprehensive value web will be co-constructed through a workshop involving the regional MAPs (Task 4.4, Spring-summer 2022). A resilience/sustainability matrix derived from the analytical framework will be used to discuss the prospects for the current value web (Task 4.5, Autumn 2022), building on the insights from WP3 (Task 3.2 and 3.3). These insights will be used to derive upgrading strategies for each value web (Task 4.6, Spring 2023).

Furthermore, the insights from these activities will provide inputs for the WP5 comparative assessments and WP6 foresight analyses and highlight potential policy barriers and enablers that can inform the policy design toolkit in WP7.

## 2. Austrian Alps: Sheep farmers from the region of Weiz

Prepared by: David Steinwender, Sandra Karner (IFZ Graz)

### 2.1. Description of Value Chain

The sheep farmers from Weiz are organized within a cooperative that markets lamb meat and sheep dairy products directly to consumers, to the local gastronomy and via food retailers. The wool is only marketed by a few of these farmers for clothing and for insulation material. Most consider the wool as side product which they use for themselves as organic fertilizer or as fuel for heating.

### 2.2. Rationale for its selection as part of the MOVING project

Sheep farming has been typical for this region for centuries. Since the 1950s wool production, which was the main product before, was increasingly replaced by lamb meat and dairy production. In the beginning of the 1990s the local dairy was supposed to be closed. However, the sheep farmers founded a cooperative to run this dairy by themselves, and they also they put back the local slaughterhouse into operation together with local premium beef producers, free range pork farmers and two small local butchers. Meanwhile, the cooperative consists of about 300 farms, most of them selling lamb meet. The number of dairy producing farmers is limited to avoid oversupply and a subsequent drop in prices. The wool is only marketed by one female farmer (currently also the vice-head of the cooperative) at bigger scale and a little amount by very few farmers. The sheep farmers from Weiz conduct already sustainable farming practices (although only 10% are organic certified). The cooperative has a very innovative marketing strategy, including the ongoing development of new products, and has also carried out some sustainable assessments (Klimabündnis; concerning the SDGs). There are two reasons for the selection: a) looking at their SES in regard to their farming practices (since sheep produce a lot of greenhouse gas emissions per livestock); b) exploring marketing potentials for their wool, which is currently not used commercially or could be marketed at a better price.



Figure 1: Sheep in backyard of cooperative (source David Steinwender)



Figure 2: Sheep at a pasture (source David Steinwender)

### 2.3. Stakeholders for Participatory Value Chain Analysis

The first contact to stakeholders of this VC has been established in July 2021 after some desk research about potential reasons for them to join the regional MAP. In a first meeting with the cooperative, a LEADER manager and the local Climate and Energy Model Region the project was presented and potential activities that might be interesting for the sheep farmers were explored. Another meeting was fixed for August in order to discuss options for MOVING to be linked to already ongoing activities. In September 2021 another meeting is scheduled with a broader range of stakeholder. Till then, further research on potential stakeholders and some interviews will be conducted.

Table 3: Stakeholders to be engaged in the Weiz Sheep VC

Stakeholder Types	To be engaged in regional MAP	Other stakeholders to be engaged in WP4
<b>Producer (farmer, forester, grassland manager)</b>	The vice-head of the cooperative “Weizer Schafbauern” and interested farmers of the initiative	Intended: representatives of other farming initiatives in the region (e.g. from ALMO/ premium beef)
<b>NGO</b>	Not decided yet	National animal welfare organisation, which is active in this region since a long time in order to elaborate with farmers on animal welfare improvements in husbandry
<b>Civil Society</b>	Local action groups (LEADER)	Potentially: Transition Oststeiermark

<b>Innovation broker/advisor</b>	Representatives from the regional Chamber of Agriculture  LEADER manager, manager of the Climate and Energy Model Region	Potentially: Innovation Center W.E.I.Z.
<b>Business (agricultural)</b>	Managing Director of the “Weizer Schafbauern”	Styrian Sheep and Goat Breeders Association
<b>Business (diversified or non-agricultural businesses including processing, distribution, retail)</b>	Local butcher, retailers selling sheep products, coordinator of the regional farmers market	Regional gardeners, Lagerhaus (retail/craft store, ...), Regional carpenter and roofer (wool as building material, insulation), potentially: regional palliative care actors (wool used in the medical sector)
<b>Public authority/policy maker</b>	Mayors of the region’s municipalities, representatives of the regional government of the Province of Styria (Dep. for Agriculture and Forestry, Hunting and Fishing)	Regional department of the Austrian Chamber of Agriculture; Austrian Economic Chamber, Federal Ministry of Agriculture, Regions and Tourism; Federal Ministry of Climate Action, Environment, Energy, Mobility, Innovation and Technology
<b>Researcher</b>	Not decided yet	Potentially: University of Graz; Medical University of Graz
<b>Other</b>	Not decided yet	Not decided yet

## 2.4. Further information

For more information please contact David Steinwender, [david.steinwender@ifz.at](mailto:david.steinwender@ifz.at)

### 3. Bulgaria: Stara Planina High Nature Value Farming Value Chain

Prepared by: Mark Redman and Vyara Stefanova (Highclere Consulting, Romania)



Figure 3: Farming Landscape (Source: Koen De Rijck/WWF-DCP)

#### 3.1. Description of Value Chain

There are around 30,700 ha of Utilised Agricultural Area (UAA) in the Western Stara Planina, of which 65% are pastures and meadows (72% of these are common grasslands) plus 20% mixed land use (mainly associated with small farms) and 15% arable land on some larger farms at lower altitude. Agriculture in the region is traditionally low input and extensive which, together with the low population density and mountain relief, means that the majority of farmland is considered as High Nature Value (HNV).

The concept of “HNV farming” was developed in the early 1990s from a growing recognition that the conservation of biodiversity in Europe depends on the continuation of low-intensity farming systems across large areas of countryside.

The HNV farmland in the Western Stara Planina ranges from alpine grasslands at high altitude to semi-natural meadows and pastures at medium altitude and mosaics of low intensive arable plots and orchards at lower altitude. The traditional low intensity grazing and mowing of these

grasslands has created a diverse range of habitats for valuable plant and animal species which is recognised in the region with a total of seven Natura 2000 sites (5 SPAs and 2 pSCI) including significant areas of farmland. The territory hosts many rare plants and animal species included in the Red Data Book of Bulgaria and protected by international red lists and conventions (IUCN, CITES).

### 3.2. Rationale for its selection as part of the MOVING project

Depopulation of the Western Stara Planina has been on-going since the 1960s and has impacted greatly upon a) traditional livestock breeding and b) the viability of small-scale farming generally. For example, the reduced numbers of people interested in shepherding has been a major driving force for the long-term abandonment of HNV grasslands with scrub encroachment leading to a loss of valuable habitats, especially in more inaccessible areas. At the same time this puts increasing pressure upon those grasslands which are most accessible – thereby also leading to a loss of biodiversity in these areas too.

Well-designed national policies, especially the implementation of the EU-funded rural development policy, has great potential to reverse the loss of public goods due to the marginalisation and/or abandonment of the HNV farmland in the region. For example, HNV grasslands have been eligible for agri-environmental payments under the 2007-2013 and 2014-2020 *Bulgarian Rural Development Programmes*. However, the grasslands continue to decline in area and greater attention needs to be given to a more integrated approach that addresses the profitability and overall socio-economic viability of the traditional HNV farming systems in the region.



Figure 4: Livestock farming in Stara Planina (Source: Koen De Rijck/WWF-DCP; Naas-Montana)

### 3.3. Stakeholders for participatory value chain analysis

Highclere Consulting has previously undertaken case study work in the province of Montana in partnership with a trusted local NGO that is also active in Horizon 2020. This NGO has worked very specifically on the issue of HNV farming in the Western Stara Planina.

Table 4: Stakeholders to be engaged in the HNV Farming Stara Planina VC

Stakeholder Types	To be engaged in regional MAP	Other stakeholders to be engaged in WP4
<b>Producer (farmer, forester, grassland manager)</b>	Traditional local farmers – mainly small-scale semi-subsistence pastoralism  Innovative local farmers e.g. "LINBUL Farm" (online sales of grass-fed beef) – see VC_07_BG in D4.1	Same as MAP
<b>NGO</b>	Society for Territorial and Environmental Prosperity (STEP)  WWF – Danube-Carpathian Programme  Bulgarian Society for Protection of Birds  National Union of Small Family Farmers and Processors	Same as MAP
<b>Civil Society</b>	N/A	
<b>Innovation broker / advisor</b>	Provincial (Montana) office of the National Agricultural Advisory Service	Same as MAP
<b>Business (agricultural)</b>	Livestock cooperatives in the region  "Food From the Mountain" Farmers' Association – see VC_09_BG in D4.1	Same as MAP
<b>Business (diversified or non-agricultural businesses including processing, distribution, retail)</b>	Regional-level meat and milk processors (e.g. slaughterhouses and commercial dairies)  On-farm dairy processing units e.g. cheesemaking – see VC_06_BG in D4.1	Same as MAP

	Traditional wool processors e.g. "Chiprovitsi" Carpets – see VC_05_BG in D4.1	
<b>Public authority / policy-maker</b>	Ministry of Agriculture (agricultural and rural development policy), including regional office (Montana)  Ministry of Environment and Water (Natura 2000), including regional office (Montana)  Representatives of local Municipalities	Same as MAP
<b>Researcher</b>	Researchers at the University of National and World Economy, Sofia	Same as MAP
<b>Others</b>	LEADER Local Action Groups: LAG Berkovitz-Godech LAG Western Stara Planina	Same as MAP

### 3.4. Further information

For more information please contact Mark Redman: [mark@highclere-consulting.com](mailto:mark@highclere-consulting.com)

## 4. Czechia: Sumava – Cesky Les Cattle Value Chain

Prepared by Lukas Zagata (CZU)

### 4.1. Description of Value Chain

The cattle husbandry has been a traditional farming activity in the region. It is also a typical image associated with agriculture in Sumava mountains. Agricultural sector in the region has undergone a transition in the last 30 years due to political and economic changes started in 1989. The collective farms that used to dominate in the socialist era were privatized and transformed its production. The current approach to farming is based on extensive use of natural sources that emphasize high natural value.

The natural conditions in the region creates a suitable ground for application of organic methods. This specialization has been strengthened by a favorable policy framework that supports organic methods. As an outcome the most farms in the region are aiming on excellent breeding programs and high- quality meat production. Some farms are located in directly in nature-protected areas and in National Park. This requires farmers to find a good balance between farming technologies and environmental constraints. On the other hand this setting has become a driver for innovations in provision of ecosystem services and special grazing managements.



Figure 5: Grazing cows during Winter (Source: Lukas Zagata)

### 4.2. Rationale for its selection as part of the MOVING project

The region under study is very diverse. The agricultural activities are carried out in altitude from 500 to 900 metres. This mainly includes cow grazing, management of perennial grassland and in limited extent a farming arable land. In the context of the MOVING project, the selection of the Value Chain is justified by economic, environmental and historical significance of the extensive

cow husbandry in the region. On one side, the Value Chain represents a traditional activity. On the other hand the the current sustainable challenges create a new pressure on farms that have to find a way how to respond to these challenges. Farms in the region perform several functions – production and environmental functions are the most important ones. Their farming activities have a strong impact on local ecosystems as well as a landscape. This is the main reason why the Value Chain shall be carefully studied and supported in finding a way how to succescully fulfil these functions.

### 4.3. Stakeholders for participatory value chain analysis

The group of relevant stakeholders is very diverse. It represents different types of actors that are engaged in farming activities and cooperate with farmers. It is highly relevant to participate with stakeholders that are associated with management, protection and research of the Natural Park Sumava. Farming activity also highly impact on regional development activities and therefore it is planned to engaged different groups of rural development actors.

Table 5: Stakeholders to be engaged in the Sumava Cattle VC

Stakeholder Types	To be engaged in regional MAP	Other stakeholders to be engaged in WP4
<b>Producer (farmer, forester, grassland manager)</b>	Owners and managers of organic beef farms	Selected farmers will be interviewed or invited to participate in specific meetings
<b>NGO</b>	A selected NGO active in the natural protection  Consumers/tourists that cooperate with farmers	Actors will be interviewed also in relation to other project activities
<b>Civil Society</b>	Organic farming association	Local groups of the national association will be invited to take part in meetings
<b>Innovation broker/advisor</b>	Local Action Group	Local Action Group will be used for establishing contacts with actors in the region
<b>Business (agricultural)</b>	Experts on breeding, organic farming methods etc.	
<b>Business (diversified or non-agricultural businesses)</b>	Producers that specialize on meat processing and food production	



	Farmers market organizers	
<b>Public authority/policy -maker</b>	<p>Representative of the National Park Sumava</p> <p>Local representatives of municipalities in the region</p>	<p>Actors will be interviewed also in relation to other project activities.</p> <p>Actors from local municipalities will be invited to discuss their views.</p>

#### 4.4. Further information

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## 5. France: Corsican Chestnut Flour Value Chain

Prepared by Jean Michel Sorba and Jean Christophe Paoli (Unité Mixte de Recherche: SELMET – LRDE – INRAE).

### 5.1. Description of Value Chain

The chestnut orchards of the Renosu massif (Gravona and Fiumorbu) produce DOP flour and other products. The chestnut orchards are an essential component of the Corsican mountain villages. Its productions are a pillar of the traditional Corsican diet. Its relaunch was made from chestnut flour, which obtained a PDO in 2010. All AOP productions is in Organic Agriculture (AB). The flour comes from the regeneration of a very small part of the existing orchards, which mostly suffer from fungal diseases (phytophthora and Cryphonectria). The success of the valuation of chestnut flour (DOP) has led to a requalification of the chestnut orchards. Its popular character is less assertive due in particular to high prices (food gentrification). Likewise, the certification of charcuterie from pigs finished in chestnut groves tends to pose problems of coexistence between breeding and castaneiculture. In addition, contemporary food issues (renewal of food crops, search for better food, and attractiveness of local productions) open a new way of valuing the fruit from new plantations.



Figure 6: Map of Renosu Massif (Source: IGN 28-7-21)

### 5.2. Rationale for its selection as part of the MOVING project

The interest of the chestnut grove is multiple:

- Prospect of building a new fruit-oriented value chain
- Multifunctionality of the environment and the organization of a coexistence between pork breeding and fruit production (Notion of “milieu resource”).
- high level of participation of local populations in the formation of value (local fair and heritage interest)

- collective action project and interterritorial governance (Bocognano and Ghisoni) nursery for new tree plantations.
- The context of high vulnerability (diseases, degeneration of orchards, global warming) and the need to relocate new plantations to higher altitudes.

Table 6: Stakeholders to be engaged in the Corsica Chestnut Flour VC

Stakeholder Types	To be engaged in regional MAP
<b>Producer (farmer, forester, grassland manager)</b>	Chestnut farmer, extensive pig farmer, and forest operator
<b>NGO</b>	IG organisation Farina castagnina corsa" PDO
<b>Civil Society</b>	Regional Nursery of "Collectivité de Corse" "Parc Naturel Régional de la Corse" CRPF (organisation in charge of forest and woods management) ONF (Office National des Forêts)
<b>Innovation broker/advisor</b>	"Comité de massif de la Corse" "Collectivité de Corse"
<b>Business (diversified or non-agricultural businesses including processing, distribution, retail)</b>	Tourism operators
<b>Public authority/policy-maker</b>	Municipality of Bocognano and Ghisoni Groupe d'Action Local : LEADER "Pays d'Ajaccio" Groupe d'Action Local : LEADER "Corse Orientale" Communauté des communes Fium'Orbu Castellu et Oriente Collectivité de Corse (Comité de massif)
<b>Researcher</b>	Direction de l'Expertise scientifique collective, de la Prospective et des Études (DEPE - INRAE) LISA Université de Corse



### 5.3. Further information

For more information please contact Jean Michel Sorba (UMR SELMET-LRDE – INRAE)

- <https://www.ca-ajaccien.corsica/developpement-rural/>
- <http://www.ccfiumorbucastellu.corsica/wp-content/uploads/2018/03/Synthese-GAL-Corse-Orientale.pdf>
- <https://www.fieradiacastagna.com/>

## 6. France: Drome Valley Sheep Meat Value Chain

Prepared by Caroline de Broissia (Communauté de Communes du Val de Drôme)

### 6.1. Description of Value Chain

Locally produced and sold sheep meat is an important economic activity in the Drome Valley. The extensive breeding and the pastoralism within middle mountains as well as the slaughter and the local valorisation will be studied.

### 6.2. Rationale for its selection as part of the MOVING project

Sheep meat produced through extensive breeding and pastoralism practices in mountain area is highly characteristic from the Drome Valley. Most of shepherds in this territory respect these production practices as well as local slaughtering and direct sales which created local economic, cultural and environmental value on the territory. Hence, this value chain is highly connected to sustainable landscape management and local food production. However, this value chain is facing strong pressures: predation, pastoral land access issues, climate change, drought, changes in consumer demand, impact on biodiversity, retribution for ecosystem services provided by pastoralism, dependency to public aid. The actors of this value chain at the local level are looking for support to face these issues. The analyses proposed by MOVING allow to collect data and to sustain sheep meat value chain actors in their adaptation to climate change as well as on the local and global valorisation of their production.

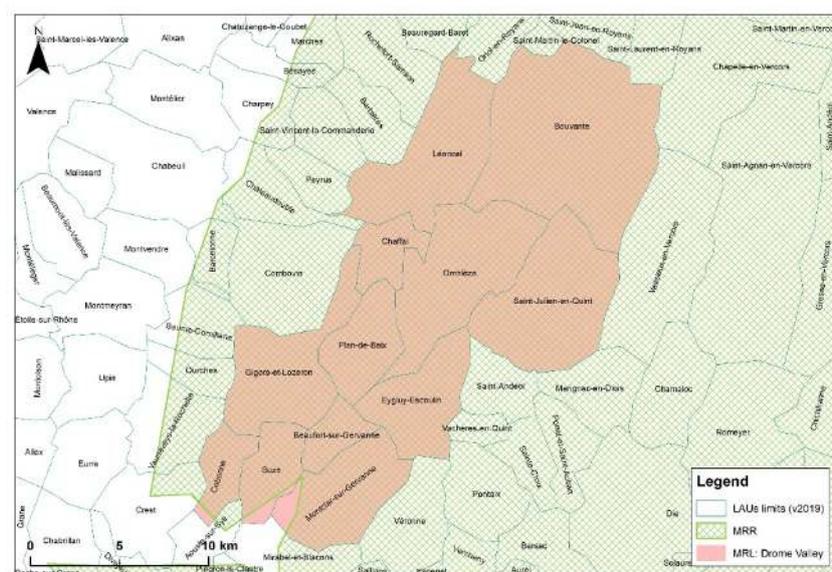


Figure 7: Drome Valley MRL (Source: UEVORA)



Figure 8: Herding Sheep, Drome Valley (Source: CCVD, Agriculture Department)

### 6.3. Stakeholders for participatory value chain analysis

A list of 50 stakeholders has been identified around the sheep meat value chain. These stakeholders are already in relationship together through past and on-going actions such as the Territorial Plan on Pastoralism, research projects or task forces on technical issues topics (climate change adaptation, predation, pastoralism/touristic cohabitation... Some of these groups are coordinated by CCVD. MOVING project was presented to local stakeholders through a communication within these existing groups and with specific emailing. Some of them will be actively involved in WP3 interviews (as facilitators or respondents). A local MOVING committee will be organized during autumn 2021, together with WP3 workshop.

Table 7: Stakeholders to be engaged in the Drome Valley Sheep Meat VC

Stakeholder Types	To be engaged in regional MAP	Other stakeholders to be engaged in WP4
<b>Producer (farmer, forester, grassland manager)</b>	Pastoral groups (association of shepherds): GP d'Ambel, CP Raye, CP Vercors Sud, CP Plan de Baix,	

	Individual shepherds and fodder producers	
<b>NGO</b>	LYSANDRA (NGO on nature protection)	
<b>Civil Society</b>	School of Suze (children involved in a school program on mountain and pastoralism) Club Randonnée (NGO for nature leisures) Ecologie au Quotidien (political NGO on ecology) Beaufort associative grocery (local grecery managed by citizen in the MRL)	
<b>Innovation broker/advisor</b>	ADEM (technical local NGO on mountain economy) FDO (Local federation of sheep meat and cheese filiere) SUACI (advisor network on mountain agricultural economy)	IDELE (breeding research institute)
<b>Business (diversified or non-agricultural businesses including processing, distribution, retail)</b>	Abattoir de Die (local slaughterhouse) TROUPEOU (local processing) Local grocery shops Nature Tourism Agents	
<b>Public authority/policy-maker</b>	Communauté de communes du Val de Drôme (municipality association – 8 municipalities within the MRL) Communauté de communes du Diois (municipality association – 1 municipality within the MRL, a lot of actors not located in the MRL but strongly connected) Communauté de communes du Royans Vercors (municipality association – 3 municipalities within the MRL) Vercors Natural Park	Chambre d’agriculture 26 (Public agriculture expert body at LAU2 scale) Drôme department (LAU2 local authority) Region Auvergne Rhone Alpes (LAU3 local authority)

	ENS Plateau d'Ambel (Natural Sensitive Environnement within the MRL, managed at LAU2 scale) 12 municipalities	
<b>Researcher</b>		INTERREFACES (expert on rural prospective) AGRO PARIS TECH (expert on local valorisation of agriculture filieres)
<b>Other</b>	CRPF (organisation in charge of forest and woods management) Forest Sappers	

## 6.4. Further information

For more information please contact Caroline de BROISSIA: [cdebroissia@val-de-drome.com](mailto:cdebroissia@val-de-drome.com)

- <https://www.valdedrome.com/5979-vous-faire-accompagner.htm>
- <https://www.paysdiois.fr/developpement-economique/les-aides-a-lagriculture-et-a-la-foret/le-plan-pastoral-territorial-ppt/>
- [http://cc-royans-vercors.org/fr\\_FR/agriculture-1398.html](http://cc-royans-vercors.org/fr_FR/agriculture-1398.html)
- <https://adem26.wordpress.com/>
- <https://syndicatovin26.wixsite.com/fdodrome>

## 7. Greece: Crete Central Rethymno Carob Value Chain

Prepared by Sofia Triliva and Kostis Pigoynakis (University of Crete)

### 7.1. Description of Value Chain

Carob trees are cultivated and harvested for their beans in the area of Central Rethymno. The value chain is mainly based on the endeavour of a local company and several mills that process the beans. The seeds, the gum and the flour by-products of carob are exported out of Crete, to national and international recipients, forming a long but narrow value chain. There is room for the broadening of the value chain and further innovation in production and processing methodologies.

### 7.2. Rationale for its selection as part of the MOVING project

Central Rethymno, a semi-mountainous area, has been selected to study carob's innovative value chain. Carob trees are highly adoptable to the region's arid climate. They are a part of the agroforestry system, important for their sustainability and the improvement of soil health.



Figure 9: Carob tree, self planted, in Central Rethymno



Figure 10: MRL of Central Rethymno

Carob beans have traditionally brought a complementary revenue to farmers and are an alternative to intensive farming. Carob bean processing has led to innovative and patented methods and variety of high value products mostly in the nutraceutical industry. The lengthening of the carob value chain during the last decade has revived interest for the cultural impact of carob in the as well as for its innovative products and by-products. The products are of high prevalence and connection to land use. Additionally, the use of the carob gum in both pharmaceutical and biomedical industries can add to the vitality of the value chain and the semi-mountainous villages in the region. There is an increase in scientific interest focusing on the cultivation, production processes and nutritional value of carob of late and European Funded research grants are currently underway. For these reasons, the carob VC seems particularly worthy of analyses in the context of the MRR. Moreover, MOVING's outcomes can be generalized and applied throughout the Island of Crete and perhaps Greece and other European countries where carob trees grow and carob pods are processed.

### 7.3. Stakeholders for participatory value chain analysis

First connection with the stakeholders was initiated on the 7<sup>th</sup> of June with a meeting at the Prefectural Unit of Rethymno, elected representatives from the Region of Crete, the Development of Rethymno, Regional Directorates for Agriculture, the Creta Carob company, and the MOVING project's researchers. In that meeting the MOVING project, the CoP and MAPS methodologies were introduced, and carob farming and by-product production were discussed at length. Following the initial meeting, phone calls to actors and stakeholders were made to introduce MOVING. The first kick of meeting of all stakeholders is planned in late July. Farmers who cultivate carob and farmers who harvest self-planted trees, academics with a research interest in carob, the Regional Directorates of Agriculture, Directorate of Rural Development, Directorate of Forestry, Carob processing plants and businesses are to attend the this first meeting

Stakeholders are going to seek better relationships with public authorities, agricultural and forestry directorates, and research centres. MOVING in Central Rethymno aims to foster stronger ties and enhance existing networks. Core stakeholders seem more committed at the moment, occasional stakeholders have been identified but additional efforts will be needed to engage them more fully. The same holds for occasional actors.

Table 8: Stakeholders to be engaged in the Crete Carob VC

Stakeholder Types	To be engaged in regional MAP	Other stakeholders to be engaged in WP4
<b>Carob producers</b>	Local Farmers who cultivate or harvest carob trees	Farmers from other areas
<b>Regional Directorates for Agriculture</b>	The director of agriculture of the Regional Unit of Rethymno	The directorate of the Region of Crete
<b>Businesses</b>	Local Carob processing companies	Regional Carob processing companies
<b>Business (diversified processing and distribution companies)</b>	Local carob by-product processing and distribution companies	Regional carob by-product processing and distribution companies
<b>Public authority/policy-makers</b>	Local Directorates of Agriculture and Economy, and Local Directorates of Forestry, Municipality of Rethymno	Regional Directorate of Agriculture and Economy, and Regional Directorate of Forestry, Other Municipalities
<b>Academics /Researchers</b>	Researchers from the University of Crete in Rethymno	Researchers from other academic institutes
<b>Carob Cultural Institutions</b>		EPIMENIDES Cultural Society Representatives

## 7.4. Further information

For more information please contact Sofia Triliva ([triliva@uoc.gr](mailto:triliva@uoc.gr)) or Kostis Pigounakis ([kpig@uoc.gr](mailto:kpig@uoc.gr)).

- Agkriktimata Giakoumakis: <http://agroktimata-giakoumaki.gr/en/>
- Creta Carob: <https://cretacarob.com/en/>



- “Epimenides” Carob Mill Arts and Cultural Center: <http://www.epimenides.gr/en/about-us/carob-mill/>

## 8. Hungary: Transdanubia Mountains – Agroecological Knowledge Value Chain

Prepared by Gusztáv Nemes and Éva Orbán (Rural Bt.)

### 8.1. Description of Value Chain

The community produces food through permaculture, contour farming, forest agriculture, extensive animal husbandry, etc. They organise courses, events exhibitions in permaculture, sustainable water management, building, etc. They are creating an online knowledge platform for sharing environmental- and community friendly technology.



Figure 11: The agroecological knowledge VC territory



Figure 12: Seed swapping circle

## 8.2. Rationale for its selection as part of the MOVING project

This VC is relevant for land use, saving and creating environmental and community values, it is an excellent example of how a conscious and powerful community can create and spread knowledge about resilience and sustainability. With this they represent an important socio-economic trend, spreading fast in developed countries, trying to find links between innovation and tradition. Also, this is an emerging eco-village so the next 3-4 years will be crucial for their development and long-term sustainability, so it is a really interesting time for them. Moreover, there is a working relationship with them, they are interested in participating in MOVING and we can provide some significant assistance in their development.

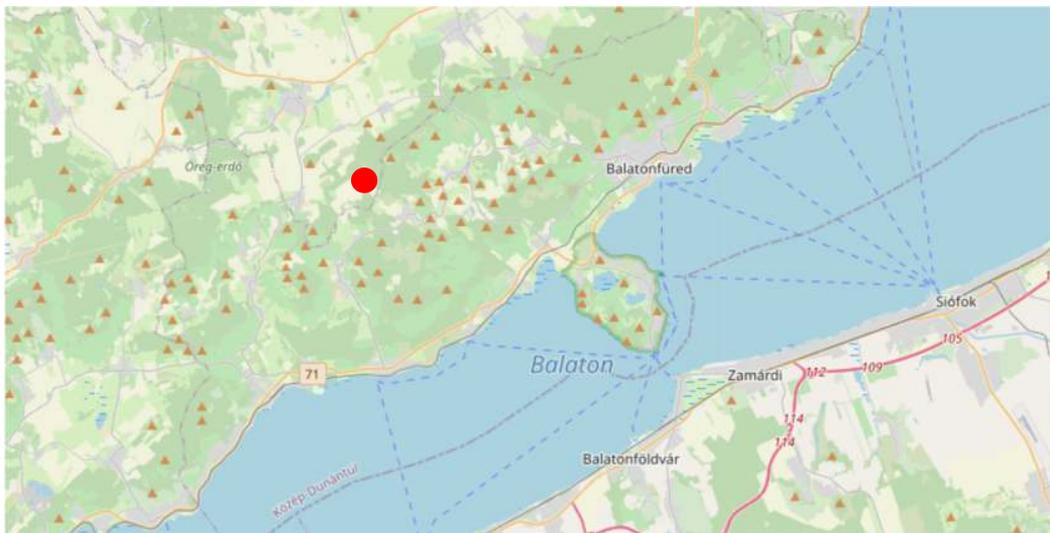


Figure 13: Location of the Transdanubian Mountains community

## 8.3. Stakeholders for participatory value chain analysis

On 12 March 2021, during the run up to the selection of the case studies we had an initial introductory meeting with the main stakeholders of the local community, to clear out expectations and intentions in connection with MOVING. This meeting was attended by 8 participants from the value chain, the local government and the Hungarian partner.

Our kick-off meeting was held on 1 June 2021. We discussed the purpose of the research and the next steps. We explained what we wanted to do and agreed what they could expect from the project. A total of 18 participants from the value chain of the Hungarian partner attended this meeting.

So far, we have focused first and foremost on the core actors directly involved in the value chain. This means 8-10 families who have moved from urban to rural area (Barnag). One family stands out among them, who have been running a national organisation for several years (<https://megyesulet.hu/>). The main aim of their organisation and the annual festival/meeting they



organise is to move to the countryside, transfer and create knowledge, and build relationships and networks.

We have also involved the local government, who share a similar world view and support the families' activities. Also, the European Capital of Culture (Veszprém2023) project was involved. In addition, we have started to contact the regional MAP, but there has not been much progress yet.

We have received a request from the VC to start and facilitate an organisational development and future planning process in the framework of moving. This will be an important way of creating engagement during the project.

Table 9: Stakeholders to be engaged in the Transdanubian Mountain Agroecological VC

Stakeholder Types	Actively engaged in regional MAP	Other stakeholders to be engaged in WP4 and regional MAP
Producer (farmer, forester, grassland manager)	8-10 families growing vegetables, fruit and animals for their own consumption, developing and sharing knowledge on agroecology	Local authority aiming to create a community farming/animal husbandry project in the village, using unutilised forest pasture (Barnag)
NGO	Mindegyüttmegy Egyesület ( <a href="https://megyesulet.hu/">https://megyesulet.hu/</a> ) A national level NGO, aiming to build and spread knowledge on sustainable livelihoods and support people and communities sharing their values, moving from the city to the countryside. Through their vital actions, urban-rural migrants are working to experience and create a new ecological paradigm.	?
Civil Society	The close, informal network of 8-10 families and their cooperation with the local authority and other institutions around and nation wide	Living Countryhouse - farm museum in Kóspallag, which preserves, re-creates and demonstrates traditional agricultural and rural lifestyle knowledge to the young urban generation. It also combines traditional knowledge with modern technology. It connects the younger

		generation with the older one, urban dwellers with rural ones, immigrants with locals making bridges amongst all these. The initiative is implemented in a partnership with the active participation of local associations, external institutions (various universities), individuals and the local authority.
Innovation broker/advisor	LEADER programme - Éltető Balaton-felvidékért Egyesület <a href="https://eltetobalatonfelvidek.hu/">https://eltetobalatonfelvidek.hu/</a>	Experts of agro-ecology and sustainable livelihoods from universities, research institutes, etc. nation wide
Business (agricultural)	Not applicable	?
Business (diversified or non-agricultural businesses including processing, distribution, retail)	Part of the community: Ranger - truffle hunting Trainings, knowledge development and sharing, combined with accommodation, food, etc. based on local production.	?
Public authority/policy-maker	Local authority (Barnag)	Balaton-felvidéki National Park Directorate <a href="https://www.bfnp.hu/en/index">https://www.bfnp.hu/en/index</a>
Researcher	?	Experts of agro-ecology and sustainable livelihoods from universities, research institutes, etc. nation wide  Lake Balaton Development Council ( <a href="https://balatonregion.hu/en/kapcsolat/">https://balatonregion.hu/en/kapcsolat/</a> ), Balaton Tourism Research Institute ( <a href="https://www.gtk.uni-pannon.hu/batuki/">https://www.gtk.uni-pannon.hu/batuki/</a> )
Other		

## 8.4. Further information

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<https://www.facebook.com/HideghegyiMenedek>

<https://megyesulet.hu/hideg-hegyi-menedek/?fbclid=IwAR0GniHN1hqygQhPqiUIizfxVFW1YDA-rInwhPSqtTCqUacK40c9xHDR2MQ>



## 9. Italy: Central Apennines Alto-Molise Dairy Value Chain

Prepared by Corrado Ievoli, Angelo Belliggiano, and Ivano Scotti (UNIMOL)

### 9.1. Description of Value Chain

Dairy productions characterise several mountain areas of the central Apennines. The local production system closely connects the ecological-environmental setting of the mountains (meadows, pastures, etc.), livestock farming (in the past linked to the transhumance practice to the Southern Italy with mainly local breeds and now permanent breeding with more productive cattle), the production of dairy goods still made in part with craft techniques, and socio-cultural heritage (e.g., the mountain farming and artisan culture). In particular, the production of the “caciocavallo cheese” symbolises MRL in question: the Alto-Molise area. The enhancement and valorisation of this value chain involve several local economic actors strictly linked to the VC (e.g., breeders, cheese makers, suppliers of goods and services related to dairy and livestock production), but also other subjects, like the tourism operators and local institutions (Municipalities, the Regional Government, and the LAG). In short, this VC involves more local natural and socio-cultural resources. Moreover, it is linked to other VCs (such as tourism), and its development can contrast socio-environmental depletion of the Alto-Molise.

### 9.2. Rationale for its selection as part of the MOVING project

The dairy value chain is historically rooted in the socio-ecological system of the Alto Molise area; its enhancement in an eco-sustainable way can improve the community resilience to face the socio-economic and environmental challenges. The Alto-Molise dairy chain involves several cheesemaker enterprises; some of them are old family companies (one of them dated 1662) that made typical local cheeses, like the “caciocavallo”, using only local raw milk establishing fair economic collaboration with local breeders, who supply the milk according to high quality and eco-sustainable standards. Other cheesemakers use pasteurised milk produced locally or in Italy for a more “industrialized” production process and fair commercial relationships with local breeders or milk providers. In both cases, the marketing strategy stresses the link between the dairy productions with Alto Molise's cultural and mountain-rural traditions (e.g., the transhumance) also supporting local sustainable development initiatives. The main cheesemakers promote innovation processes in case of products, production processes and marketing initiatives. These innovations transformed an artisanal product (like the “caciocavallo” cheese) into a high quality good cultural defined that consumers recognise as a valuable product.

The most important dairy companies of the area have a strong orientation for external linkages, i.e. towards the haute cuisine sector and, in some cases, experiential tourism (e.g., dairy crafts museum). Others are mainly “artisanal” firms. The increased request for milk may stress the local environment. The development of related rural or enogastronomic tourism can influence both the local environment and culture. Through the selected value chain seems possible to understand

how the socio-environmental challenges can be addressed by developing the resilience of the local community without compromising the socio-ecological system. In this perspective, establishing virtuous relations among milk producers, cheesemakers, goods/services providers, policymakers, and local civil society based on economic interests, common values, and perspective appear essential to define a development strategy toward sustainable socio-economic development and environmental quality of the territory.



Figure 14: MRR (hashed black), MRL (yellow areas), Molie region (white line) – Left; Caciocavallo di Agone cheese – Right.

### 9.3. Stakeholders for participatory value chain analysis

The first stakeholders were identified considering a group of institutional actors, producers and representatives of cultural and environmental associations already known by the UNIMOL research team. In particular, through initial contacts with the mayor of Agnone and the two major local cheesemakers, a list of actors has been defined. As a result, the initial MAP actors involved 21 local actors. On 18 July in Agnone - central both geographically and for the value chain in the MRL - a public event was organized inviting to the first core of MAP and local civil society. On this occasion, the UNIMOL team presented the MOVING project, the research aims, the phases, and the MAP's role in MOVING.

In the meeting, a questionnaire was distributed to collect preliminary information about the stakeholders' opinions on the critical points of the socio-ecological system, the value chain, the actors they consider relevant to involve in MOVING and their contacts (email, telephone, etc.). The respondents also signed a form on privacy and personal data. This meeting was the first contact and anticipated the engagement of stakeholders for the next steps in September and beyond.

Table 10: Stakeholders to be engaged in the Alto-Molise Dairy VC

Stakeholder Types	To be engaged in regional MAP	Other stakeholders to be engaged in WP4
<b>Producer (farmer, forester, grassland manager)</b>	Cheesemakers, both artisanal producers and the more industrial ones, both large cheese factory and small producers.  Breeders producing milk through traditional farming systems (pasture, meadows, etc.) and those that use a more sedentary system (barn-based farming).	The same of MAP
<b>NGO</b>	NO	NO
<b>Civil Society</b>	Local environmental associations and local cultural association related to the pastoral and dairy tradition.	The same of MAP
<b>Innovation broker/advisor</b>	Local advisors	The same of MAP
<b>Business (agricultural)</b>	NO	NO
<b>Business (diversified or non-agricultural businesses including processing, distribution, retail)</b>	Professionals offering services for breeding (e.g., veterinaries) and cheese making process (i.e., food chemists); financial service companies for agriculture (e.g, rural banks).	NO
<b>Public authority/policymaker</b>	Municipalities (mayors and councillors) of the MRL.	The same of MAP



	Local Acton Group “Alto Molise”.	
<b>Researcher</b>	Researchers of UNIMOL	The same of MAP
<b>Other</b>	No	No

## 9.4. Further information

For more information please contact Corrado Ievoli ([ievoli@unimol.it](mailto:ievoli@unimol.it)).

Following some references related to the selected value chain:

- Local Action Group “Alto Molise”: <https://www.galaltomolise.org/>
- Cheese factory “Di Nucci”: <https://www.caseificiodinucci.it/>
- Cheese factory “Di Pasquo”: <https://www.caseificiodipasquo.com/it/>
- City of Agnone: <https://www.comune.agnone.is.it/hh/index.php>

## 10. Italy: Eastern Alps Trento Doc Wine Value Chain

Prepared by Cristina Micheloni, Ekaterina Kleshcheva, and Gianni Trioli (Vinidea).

### 10.1. Description of Value Chain

Wine production of Trento Doc type, that is a sparkling wine produced by Classic Method, with secondary fermentation having place in bottle and grape exclusively produced in Trento province.

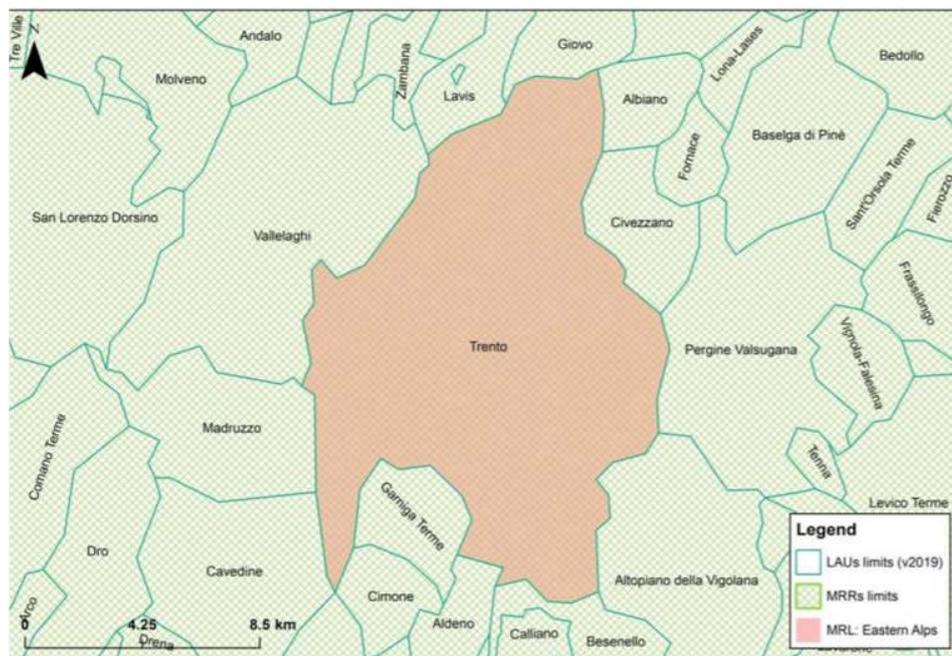


Figure 15: MRL within Eastern Alps MRR (Source : UEVORA)

### 10.2. Rationale for its selection as part of the MOVING project

Trento Doc wine production is deeply intertwined with Trentino landscape as wine production has long tradition in the area. Grape is mainly grown by small family farms in plots often smaller than 1ha and alternated with apple production. The specific Trento Doc production was started by the oenologist Giulio Ferrari in early 1900's and is nowadays a worldwide acknowledged quality product. What is remarkable is that Ferrari company, besides own vineyards, has long term contracts with the hundreds of small family farms and offers them advisory and bureaucratic support. Of about 400 farmers involved about half are organic. In the last decade the Ferrari company is assessing the production of grape in higher areas as climate change is hindering the quality features of the wine.

### 10.3. Stakeholders for participatory value chain analysis

The value chain actors are already in contact and project partner (Vinidea) is involved in several of their technical activities, especially through Ferrari advisory team. MOVING project was introduced to the core company and advisers group but a deeper and larger presentation and involvement will take place after vintage, when all farmers and advisers have more available time.

Other relevant stakeholders are the researchers of the provincial research institute (Fondazione Edmund Mach) who are already in contact with Vinidea thanks to previous activities, and the provincial policy makers who will be involved after summer.

Table 11: Stakeholders to be engaged in the Eastern Alps Trento Doc VC

Stakeholder Types	To be engaged in regional MAP	Other stakeholders to be engaged in WP4
Producer (farmer, forester, grassland manager)	Grape producers Apple producers (as the 2 productions are competing)	
NGO	1 local environmental association	
Civil Society	consumers/citizens associations	
Innovation broker/advisor	3 advisers (1 Assoenologi Trentino member, 1 from public extension, 1 private)	
Business (agricultural)	Ferrari company other wine producers (individuals and coops)	
Business (diversified or non-agricultural businesses including processing, distribution, retail)	Tourist agency HORECA representatives	
Public authority/policy-maker	Provincial Directorate of Agriculture	
Researcher	E.Mach Foundation (several depts)	



Other	Mountain agency Forestry managers	
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## 10.4. Further information

For more information please contact Cristina Micheloni ([cristina.micheloni@vinidea.it](mailto:cristina.micheloni@vinidea.it))

- <https://trentodoc.com/en/>
- <https://www.ferraritrento.com/en/>

## 11. Italy: Northern Apennines Chestnut Flour VC

Prepared by: Francesco Felici (UNIFI)

In the MMR, chestnuts trees have historically represented the most important land use type. Nutritional traits of chestnuts flour have always been considered valuable and have been particularly appreciated by the local population.

### 11.1. Rationale for its selection as part of the MOVING project

The chestnut flour value chain has been selected because chestnuts are collected and processed by small farms that have a high identity value. The chestnut tree performs various functions: productive, protective, naturalistic, landscape, recreational, didactic.



Figure 16: Municipality of Stazzema – Left ; Chestnut trees surrounding village – Right.

### 11.2. Stakeholders for participatory value chain analysis

The “local” Multi-Actor Platform (MAP) kick-off meeting was held the 16 June: The stakeholder involved have a different background. The first meeting was done to describe the project and to know each other's.

Table 12: Stakeholders to be engaged in the Northern Apennines Chestnut Flour VC

Stakeholder Types	To be engaged in regional MAP	Other stakeholders to be engaged in WP4
Producer (farmer, forester, grassland manager)	Two farmers	The same of MAP
NGO	Chestnut associations	The same of MAP
Civil Society	Blogger specialised in local food	The same of MAP
Innovation broker/advisor	NO	NO
Business (agricultural)	This subject will be involved in the next meeting	NO
Business (diversified or non-agricultural businesses including processing, distribution, retail)	A representative of one large retailer involved in social activities on critical consumption	NO
Public authority/policymaker	Association of local municipalities (" <i>Unione dei Comuni</i> ") and " <i>Consorzio di Bonifica Toscana Nord</i> ".	The same of MAP
Researcher	Professors at agricultural secondary school and researchers of UNIPI	The same of MAP
Other		

### 11.3. Further information

For more information please contact Francesco Felici ([francesco.felici75@gmail.com](mailto:francesco.felici75@gmail.com)).

## 12. North Macedonia: Rural Tourism in the Maleshevski Mountains

Prepared by Nehat Ramadani (CNVP)

### 12.1. Description of the Value chain

Maleshevski mountains are located in the eastern part of the Republic of North Macedonia. It covers the municipalities of Berovo and Pehchevo, and is characterized with the natural and cultural wealth. Two rivers cross the region, Bregalnica and Strumica. Forests covers 52% of the Maleshevija region, while pastures around 20%.

### 12.2. Rationale for its selection as part of the MOVING project

There are hiking trails that are made for recreation, hiking, mountain biking, and also enjoying the clean mountain air. The trails are part of the Balkan Mountaineering Transversal and are published in the mountain trials maps. There are numerous rapids, small cascades and waterfalls (up to 10 m high) along the mountain rivers in the region.

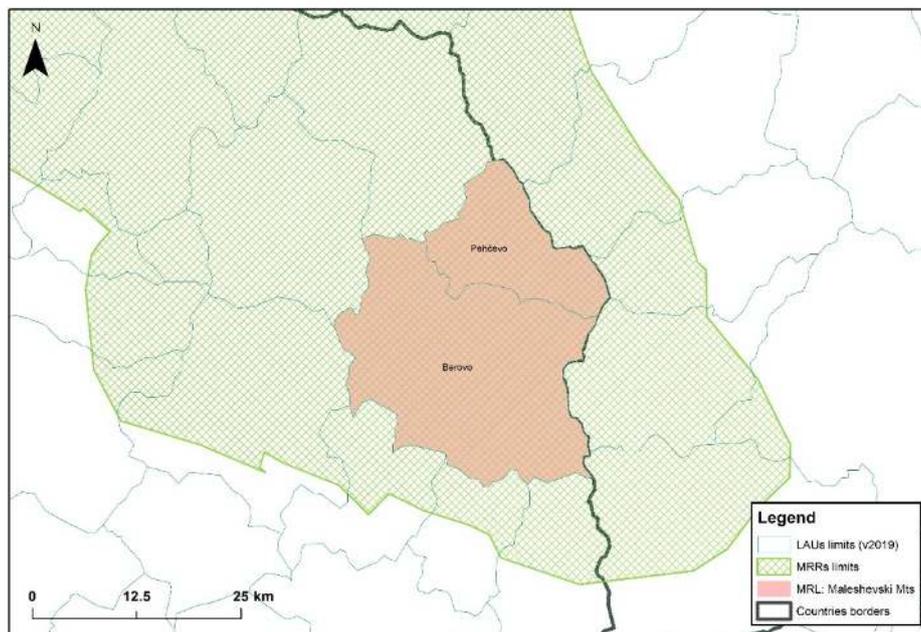


Figure 17: Maleshevski mountains in North Macedonia (Source : UEVORA)

### 12.3. Stakeholders for participatory value chain analysis

We have very good relationships with the stakeholders in Maleshevski mountains, and this is due to being active our organisation in that region with previous activities and actions. During this period, we had individual meetings with few of the regional MAP actors in the list below. We haven't had a formal kick-off meeting with stakeholders, but rather individual meetings. Given the currently the summer period and vacations, we expect the kick-off meeting to be during September 2021. In the coming period, the list of the stakeholders might be extended/narrowed and adjusted to the circumstances, given the activities as they come in the region.

Table 13: Stakeholders to be engaged in the Maleshevski Mountains Rural Tourism VC

Stakeholder Types	To be engaged in regional MAP
Business (accommodation, rural tourism)	Local hotel
Business (accommodation, rural tourism)	Local private accommodation
Business (accommodation, rural tourism)	Local private accommodation
Business (accommodation, rural tourism)	Local hotel
Public authority/policy-maker	Local Municipality 1
Public authority/policy-maker	Local Municipality 2
Producer (farmer, forester, grassland manager)	Local producer
Business (agricultural)	Local business entity
Civil Society	Local NGO
Civil Society	Local NGO

### 12.4. Further information

For more information please contact Nehat Ramadani ([nehat.ramadani@cnvp-eu.org](mailto:nehat.ramadani@cnvp-eu.org)).

## 13. Portugal: Cordilheira Central (Serra da Estrela PDO Cheese)

Prepared by Teresa Pinto-Correia, Élia Pires-Marques, Elvira Sales-Baptista, and Nuno Guiomar (University of Évora)

### 13.1. Description of Value Chain

Serra da Estrela PDO Cheese is a traditional sheep's milk cheese made locally only with milk from two autochthonous sheep breeds (Bordaleira da Serra da Estrela and/or Churra Mondegueira), thistle flower (*Cynara cardunculus*) and salt, and resorting to traditional knowledge on cheese manufacture techniques passed down from generation to generation.

Animals may feed from two types of local pastures: 1) natural pastures – made up of spontaneous vivacious grasses and 2) cultivated pastures – constituted by white clover and underground clovers. However, simple or compound food can be used to reinforce the diet, especially at the beginning and end of pregnancy and at the peak of lactation.

Currently, at the geographical production area of Serra da Estrela PDO Cheese, there are 27 small to medium PDO Cheese production plants, about 125 dairy farms producing Bordaleira da Serra da Estrela and Churra Mondegueira milk and a cheese producers cooperative – EstrelaCoop – which is mainly dedicated to technical assistance to members and to the defence of the Protected Designation of Origin – Serra da Estrela.



Figure 18: Bordaleira da Serra da Estrela sheep breed flock

## 13.2. Rationale for its selection as part of the MOVING project

Serra da Estrela PDO Cheese is highly characteristic of the region where it is produced and is highly connected to land use. Furthermore, it is directly interconnected with two other PDO products – Serra da Estrela PDO Cottage Cheese and Serra da Estrela PDO Lamb meat – and with Burel fabric (made from wool exclusively from Bordaleira da Serra da Estrela sheep breed) – but only at the production level and at the farm scale.

Nowadays, the VC is facing important challenges, such as the reduction in the number of shepherds and the increase in number of animals of non-autochthonous sheep breeds, as many shepherds have the perception the later are more profitable.

The analysis of this Value Chain aims to assess how a product linked to territorial identity and endogenous resources may contribute to this mountain area sustainability and resilience and which are the main opportunities and challenges it poses.

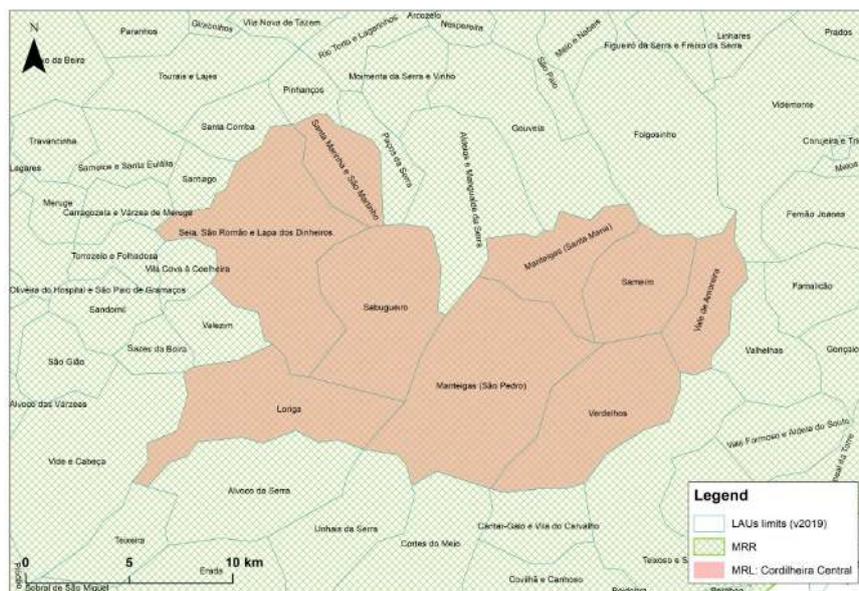


Figure 19: MRL within Cordilheira Central MRR (Source : UEVORA)

## 13.3. Stakeholders for participatory value chain analysis

A kick-off meeting of [MOVING's Regional Multi-Actor Platform](#) (MAP) of Serra da Estrela MRL has been held at Manteigas (Portugal) on June 2021.

The [objectives](#) of the [MOVING](#) project were already presented in previous informal meetings with individual actors, but during this session the objectives were explained to the whole group and the opportunity was taken to have a participatory stakeholder discussion on the relevance of the project, the strategies and the expected results.

In addition, this kick-off meeting highlighted current issues of concern to stakeholders and was a first step to explore synergies between them and learn from each other, in an effort to build this regional MAP.

This session brought together a total of 26 local and regional stakeholders, directly or indirectly linked to the Serra da Estrela PDO Cheese VC. Shepherds of the Bordaleira da Serra da Estrela sheep breed, associations of commons, cheesemakers, nature tourism agents and representatives of the PDO cheese producers' cooperative and public bodies were present, among others. Most of the participants showed a real interest in actively participating in the MOVING project.

Table 14: Stakeholders to be engaged in the Serra da Estrela Cheese VC

Stakeholder Types	To be engaged in regional MAP
Producer (farmer, forester, grassland manager)	Shepherds Sheep Producers Association
NGO	
Civil Society	Cultural Association
Innovation broker/advisor	
Business (agricultural)	PDO Cheese Producers PDO Cheese Cooperative Producers of Other Types of Cheese
Business (diversified or non-agricultural businesses including processing, distribution, retail)	Burel Production Plants Nature Tourism Agents
Public authority/policy-maker	Municipalities Institute for Nature Conservation Regional Directorate of Agriculture
Researcher	Academic Researchers
Other	Common Lands Associations Forest Sappers Mountain Interpretation Centre Health Defence Association



## 13.4. Further information

For more information please contact Teresa Pinto-Correia ([mtpc@uevora.pt](mailto:mtpc@uevora.pt)).

- <https://estrelacoop.pt/>
- <https://tradicional.dgadr.gov.pt/pt/cat/queijos-e-produtos-lacteos/31-queijo-da-serra-da-estrela>



## 14. Portugal: Maciço Noroeste - DO Douro Wine

Prepared by: Leonor Santos, Raquel Guise, Cristina Micheloni, Ekaterina Kleshcheva, Gianni Trioli (Vinidea)

### 14.1. Description of Value Chain

“DO Douro” wine has only two decades of existence. There has been an increase in the number of new wine producing companies, in the region, that resort to the use of new technologies, resulting in differentiating products.

### 14.2. Rationale for its selection as part of the MOVING project

This is a high quality and internationally renowned product. The characteristics of the territory such as soil, climate, altitude, slope, precipitation give the wines unique characteristics. It comes from a territory with a striking historical past in the area of viticulture and classified by UNESCO as a World Heritage Site (Alto Douro Wine Region and Coa Valley Archaeological Park). Currently, there are studies in progress to assess the impact of climate change in the Vale do Côa region. The "CoaClimateRisk project - The impact of climate change and adaptation measures for the main agricultural crops in the Vale do Côa region" was recently approved. These forecasts will assist as a tool to support decision making by agents of the agricultural sector in the region, in the medium and long term. The municipality of Vila Nova de Foz Côa is characterized by having a dispersed population, for which the existence of agricultural soils (vines, almond and olive trees) is decisive, in an association of smallholdings with significant extensions of vineyards, where this is assumed as the predominant culture. The impact of climate change in the Vila Nova de Foz Côa region have been similar to the environmental changes occurred in the rest of the Douro region. High temperatures Summers, heat waves, prolonged and intense droughts have been experienced throughout the region. These changes call into question the survival of some crops, including vines. The adaptation of the production methods and agricultural crops is essential.

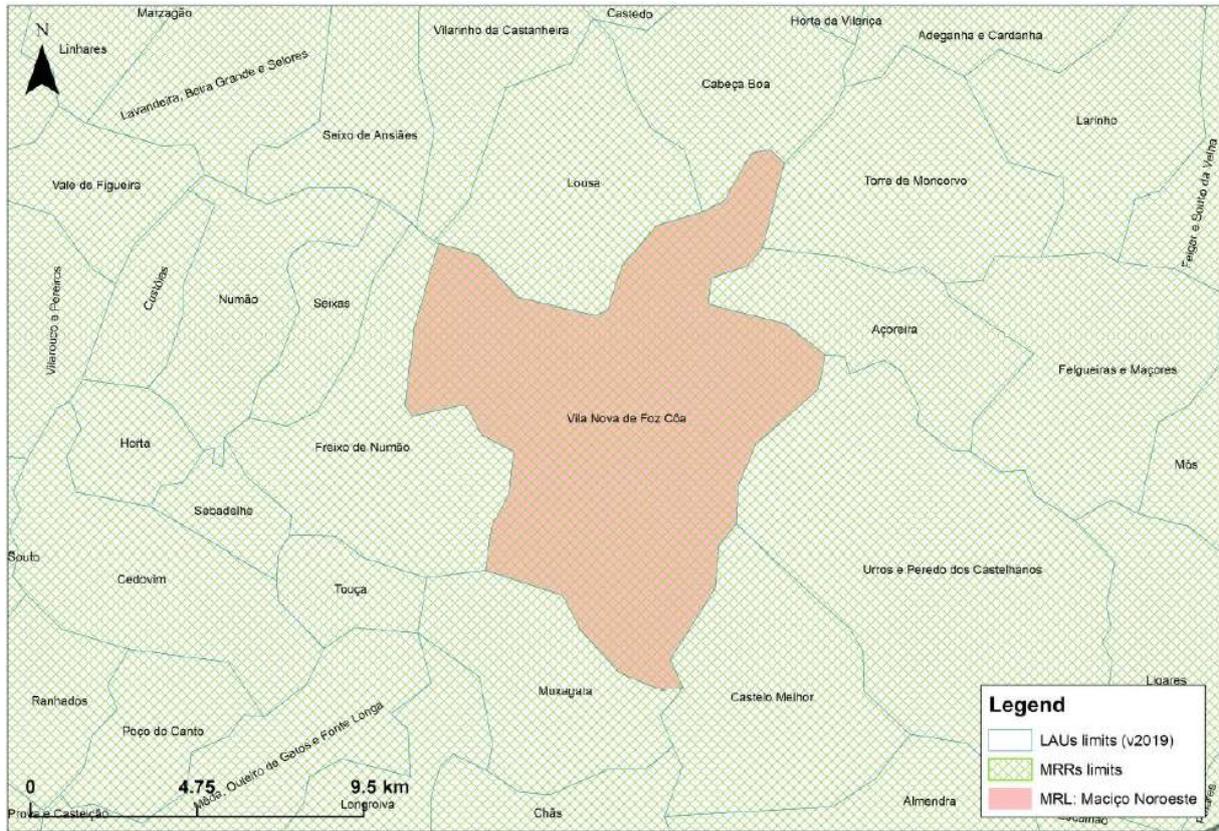


Figure 20: MRL within Maciço Noroeste MRR (Source : UEVORA)

### 14.3. Stakeholders for participatory value chain analysis

Vinidea is contact with the regional collaboration team (Vinideas) who oversees gathering together the value chain actors for participatory value chain analysis. The kick-off meeting and other activities (interviews, meetings, seminars) are programmed after the summer break and harvest activities (late September – October). For now, a preliminary group of stakeholders has been established in order to be involved in forthcoming events.

Table 15: Stakeholders to be engaged in the Maciço Noroeste DO Douro Wine VC

Stakeholder Types	To be engaged in regional MAP
Producer (farmer, forester, grassland manager)	Vine Producers
	Producers Association
NGO	

<b>Civil Society</b>	Cultural Association
<b>Innovation broker/advisor</b>	Laboratory on Wine research
<b>Business (agricultural)</b>	Wine Producers
	Wine Cooperatives
	Producers of chestnut, almond and olive oil
<b>Business (diversified or non-agricultural businesses including processing, distribution, retail)</b>	Agrotech
	Ecosystems management
	Museums
	Nature Tourism Agents
<b>Public authority/policy-maker</b>	Municipalities
	Municipalities association
	Institute for Nature Conservation
	Regional Directorate of Agriculture
	CVRs and Wine Institute
<b>Researcher</b>	Academic Institutions
<b>Other</b>	Common Lands Associations
	Health Defence Association
	Tourism Association (nature)
	Enotourism Association

## 14.4. Further information

For more information, please contact Ekaterina Kleshcheva ([ekaterina.kleshcheva@vinidea.it](mailto:ekaterina.kleshcheva@vinidea.it)).

## 15. Romania: Ecotourism Southern Romanian Carpathian Mountains

Prepared by Mark Redman and Raluca Barbu (Highclere Consulting, Romania)



Figure 21: Romanian Mountain Landscape (Source: AER)

### 15.1. Description of Value Chain: Certified Ecotourism

Ecotourism is a form of tourism where the main motivation of the tourist is to observe and enjoy both nature and the traditional local customs regarding nature. Key principles guiding the development and promotion of ecotourism are:

- A primary focus upon the conservation and protection of natural areas
- The development of ecotourism products based upon the appropriate interpretation of natural and socio-cultural values in these areas
- Use of local human resources and constructive input to the development of local communities
- Education and raising awareness of environmental sustainability among tourists and local communities
- Effective marketing and the delivery of a high degree of tourist satisfaction.

Eco-tourism is a well-established concept in the international tourist market and has been very effectively adapted to the Romanian context by the Association of Ecotourism in Romania (AER).

AER is a membership organisation and works to bring together the public and private sectors in innovative ways to create partnerships for nature conservation and sustainable tourism

development with a focus upon improving the quality of ecotourism services and infrastructure for selected ecotourism destinations across the whole of Romania.

In order to achieve this AER operates an Ecotourism Certification System based upon the *Nature and Ecotourism Accreditation Programme* promoted by the Australian Ecotourism Association and on *Nature's Best* developed by the Swedish Ecotourism Association.

The AER certification system addresses two different categories of applicants:

- ecotourism programmes / tours provided by tour-operators (i.e. eco-tours of maximum 15 participants), and;
- small-scale accommodation structures in rural and natural areas (eco-lodges and guesthouses of maximum 25 rooms).



Figure 22: Ecotourists (Source: AER)

## 15.2. Rationale for its selection as part of the MOVING project

Ecotourism appears to have significant potential to contribute to the sustainability and resilience of mountain areas in Romania and therefore justifies investigation in MOVING.

The region selected for undertaking this study is the Piatra Craiului massif which is widely considered as one of the “jewels in the crown” of the Southern Romanian Carpathians. Land use is a combination of traditional semi-subsistence pastoralism and deciduous forest, but the landscape is dominated by a 25 km long limestone ridge (highest elevation is 2,238 metres) with deep gorges and caves. This creates a unique mountain landscape that is highly appreciated nationally and internationally. For example, the 2003 movie *Cold Mountain* was filmed in and around the "Prăpăstiile Zărneștilor" gorge which is one of the most popular visitor destinations in the area.

A total of six LAUs with a total area of 845 km<sup>2</sup> in two counties (Brașov and Argeș) encompass the massif – of which 148 km<sup>2</sup> (18%) is designated as National Park and overlaps with two

important Natura 2000 sites. The Piatra Craiului National Park is a high-quality tourist destination in Romania, but also a fragile landscape and vulnerable ecosystem that is under great pressure from inappropriate development.

Certified ecotourism is a form of tourism that is very well-suited to the sustainable development of the local area. The Zărnești – Piatra Craiului region is one of 10 ‘eco-destinations’ promoted by AER with a range of ecotourism services that are offered locally in partnership with the National Park Authority and local businesses that have certified by AER. These services include ‘eco-tours’ with experienced local guides to visit wolf, lynx and bear tracks; specialist hiking trips for nature photography; low impact mountain biking trails, and; small scale / low impact accommodation.



Figure 23: Hikers and Mountain Bikers in the National Park (Source: AER)

### 15.3. Stakeholders for participatory value chain analysis

Highclere Consulting is based in Zărnești on the northern edge of the Piatra Craiului massif within the AER Zărnești – Piatra Craiului ‘eco-destination’ and knows very well many of the local businesses and residents providing accommodation, local food and other eco-tourism services in the area – as well as key NGOs and public authorities supporting ecotourism in the region.

Table 16: Stakeholders to be engaged in the Carpathian Mountains Ecotourism VC

Stakeholder Types	To be engaged in regional MAP	Other stakeholders to be engaged in WP4
<b>Producers (farmer, forester, grassland manager)</b>	Local farmers – mainly small-scale semi-subsistence pastoralism	Same as MAP
<b>NGO</b>	Association of Ecotourism in Romania (AER)	Same as MAP

	WWF – Danube Carpathian Programme Mountain Guides and Mountain Leaders Society Local development NGOs	
<b>Civil Society</b>	N/A	
<b>Innovation broker / advisor</b>	Local ‘champions’ of the region (including local traditional food products)	Same as MAP
<b>Business (agricultural)</b>	N/A	
<b>Business</b>	Local accommodation providers Traditional / artisan food producers Local mountain / hiking guides Providers of specialist activities (e.g. hiking trips for nature photography, active trekking, guided mountain bike tours etc.) Other specialist eco-tour operators	Same as MAP
<b>Public authority / policy-maker</b>	Piatra Craiului National Park Administration National Mountain Area Agency (Brasov office) National Agency for Protection of the Environment (Brasov office) Representatives of the LAUs (local Mayor’s offices)	Same as MAP
	Local researchers from the University of Transylvania Brasov	Same as MAP
	LEADER Local Action Group: Asociația "Grupul de Acțiune Locală Transcarpatica"	Same as MAP

## 15.4. Further information

For more information please contact Mark Redman ([mark@highclere-consulting.com](mailto:mark@highclere-consulting.com)).

## 16. Serbia: Dinaric Mountains Sjenica lamb (PDO)

Prepared by Tamara Živadinović and Dragana Tar (Mena Group)

### 16.1. Description of Value Chain

Sjenica lamb is a PDO for fresh lamb meat deriving from Sjenica sheep a local autochthonous sheep breed. This sheep and its meat are very well known in the region, as well as on international markets, and it is protected as PDO product at Serbian level (Protected Designation of Origin).

Livestock husbandry is the main agricultural activity in the area of Pester plateau. Lamb meat (Sjenica lamb) production is at the basis of the VC, having sheep farms solely for meat production, where farmers sell them as live animals to the middle-man (usually at very low prices). There were about 28.433 sheep at Sjenica municipality in 2018, but this number is declining.

Animals are grazing on natural pastures, with high biodiversity of specific wild herbs and plants, which leads to high quality of sheep meat. Farms are mostly owned by farmers and registered as agriculture households, and there are a couple of meat processing units (companies) and small dairies.

As a part of the production systems, other VC are interlinked with the sheep meat and dairy VCs. There are three PDOs registered in the same area that represent different food products from the same sheep farms – Sjenica lamb, sjenica stelja (dried sheep meat/specific as drying the whole deboned animal) and Sjenica sheep cheese. Sheep meat is also frequently used (older animals) as part of the local diet linked to festivities and traditional events.

This VC is closely interconnected with VC of cattle breeding, beef meat production and processing, together with producing sheep and mixed cheese (sheep and cow milk cheese).

Farmers produce Sjenica sheep cheese, also protected as a PDO product at national level. Traditional sheep meat products like Sjenica stelja (dried sheep meat / specific as drying the whole animal) is also protected as PDO product.

On the farm processing is traditional. Products are mostly sold on local and regional markets (South Serbia, Kosovo and Montenegro), while there is rising interest for export that used to be very prominent. Processing companies usually additionally have Halal certification, aiming markets and customers with specific request for this standard. Middle-men make an important link to the markets, leaving livestock farmers in a very vulnerable and passive position, as they are fully dependant on this channels and intermediaries. Small share is sold through registered processing establishments, mostly to large retail chains and butcher shops.

Sheep are sold to the middle-man, and only a smaller percentage is sold through the meat processors and local slaughterhouses, directly to the butcher shops and big retailers' chains.



## 16.2. Rationale for its selection as part of the MOVING project

Pester plateau is spread on the territory of Sjenica municipality, and parts of Tutin and Novi Pazar. It spreads over 2 NUTS3 regions - Zlatibor and Raska districts. This area is highland landscape of meadows and pastures, with karst structure. This climate in this area is harsh – with 130-140 days with temperature below zero and extremes to  $-42^{\circ}\text{C}$  and short and dry summers. Very small percentage of the land is cultivated, because farmers usually graze animals on natural pastures, using very little or no fertilisation and land management.

Population is multicultural, combined from Muslim and Christian population, with strong connections to neighbouring countries (farmers have land in cross border regions, mostly with Montenegro). Percentage of young people is higher than in some other mountainous areas. Parts of the MRL area belongs to the specially protected area, with Ramsar site since 2006.

The area is well known for its natural values, as well as for the quality products. Sheep meat has very strong reputation in the country, as well as abroad (region and traditional markets / Middle East and North Africa countries). There are potentials to protect PDO product at the EU level and have direct export with the PDO label. Adding value to the products by certifying organic production, and/or other certificates that are in line with nature protection is of a great potential. Additionally, connecting the products with sustainable tourism (rural tourism) and other channels for selling these products (e-commerce) creates potential for avoiding low prices and selling animals. Reopening of export to countries asking for halal meat (Middle East, Turkey, etc.) is slowly increasing. Rising interest of young people to be involved in the livestock production creates possibilities for new approaches to traditional farming and product marketing. Sjenica and Tutin areas have higher percentage of young people than other mountainous regions.

Key local assets are multi-cultural area, with strong connections to the neighbouring countries – Montenegro, Bosnia and Herzegovina and Albania. Traditional knowledge on livestock farming and production of traditional products (cheese, dry meat) is kept in large multi-generational families. Strong connection to the cultural and national heritage. High level of entrepreneurial spirit, reputation of environmentally clean and healthy area, food and hospitality, are the assets incorporated in all products and services offered.

Specific grazing systems (Highland mountains grazing systems - nomadic). Emerging small and middle size farms are registering processing due to new regulation that are set for small farms and processing units.

The area is close to major road to Montenegro, but with very bad infrastructure (roads, infrastructure waste-management, etc.). Due to its beauty and uniqueness, and good quality food, this area is interesting for tourism, mostly rural tourism and adventure tourism. Proximity of Uvac lake (nature reserve) is of a great importance for touristic offer of the area.

The area is facing multiple vulnerabilities that are a combination of natural pressures, (due to the changes in precipitation and loss of biodiversity due to the mismanagement of the natural habitats), demographic (out migration, lack of working labour) to economic (extensive agricultural practices that face strains in competitiveness, comparing to more intensive and resource efficient

production systems), including marginalisation in terms of public investment and development priorities.



Figure 24: Sheep Grazing at Pester Plateau



Figure 25: Landscapes of Sjenica

### **16.3. Stakeholders for participatory value chain analysis**

The Mena team has started preparatory activities for the kick-off meeting that will happen late August/beginning of September. The initial contacts with stakeholders from the area started already by contacting the local Centre for rural and agricultural development, that is an advisory service who signed supporting letters to the project in its early/preparatory stage. This Center has

a very good overview of the area and the VC itself, serving also as a food safety lab for local agricultural products, milk in particular, and we use them as one of the main reference points and key informants during the project.

The leading VC actors and stakeholders are currently very busy with seasonal activities, which is why we decided to have the kick-off meeting end of summer, when their seasonal works are going to be less intensive.

According to the previous experiences of working in this area, as well as talking with the advisory service, we could expect high interest from local and regional stakeholders to participate in the project activities.

On the other hand, national level (Ministries) would need to be also closely involved in different project activities in order to be able to influence national policies by bringing strategies and solutions from created by local level actors and stakeholders.

Table 17: Stakeholders to be engaged in the Sienica Lamb VC

Stakeholder Types	To be engaged in regional MAP	Other stakeholders to be engaged in WP4
Producers (farmers, sheep breeders) and their organisations	Farmers (bigger farms, young farmers starting to build the production, farmer leaders) and their associations will be invited to become members of the regional MAP	Farmers from the bordering areas, and even the cross regional representatives – sheep farmers from the wider area, or other mountainous regions of Serbia
NGOs – environmental, rural development/regional development	Local NGOs will be invited to participate	Bordering municipalities NGOs will be invited to participate, as well as national level (NGOs dealing with specific protected areas, registered at national level, but working at the local level too
Advisors (agriculture)	Local advisory service is one of the main SH; additionally, national advisory service/local office will be invited to participate	National institute for advisory service and applied science in agriculture will be invited to participate in some of the activities, local animal registry service, and food safety lab
Business (agricultural) – slaughterhouses and processing units	Local business (slaughterhouses) and small	Traders, exporters and retail that offer products from the VC

	registered processors will be invited to participate	
Business (veterinarian and cattle/sheep registration office, distributors, restaurants and, retail, touristic businesses)	All closely related local businesses will be invited to participate	Businesses closely related to sheep meat from Sjenica VC will be included in some activities
Local self-governments	Representatives of local self-governments from the MRL will be invited to participate	Bordering municipalities' representatives will be involved in some activities
Regional development agencies	The two RDAs existing in the area will be invited to participate	
Governmental and state level institutions	Nature protection Institute will be invited to participate (due to the Ramsar area and other protected species in the MRL);	Ministry of Agriculture, Forestry and Water Management will be involved in activities and will be a part of key informant interviews, as well as the Ministry of environment
Researchers	Local and national level of research community connected to Pester plateau and Sjenica sheep will be invited to participate in some activities	
Other		

## 16.4. Further information

For more information please contact Tamara Zivadinovic ([tamara.zivadinovic@gmail.com](mailto:tamara.zivadinovic@gmail.com)).

- <http://www.westserbia.org/en/location/sjenica/pester-plateau/>
- SERBIA Pestorsko polje RIS 2006 E ([ramsar.org](http://ramsar.org))
- [https://rsis.ramsar.org/RISapp/files/RISrep/RS1656RISformer\\_190528.pdf](https://rsis.ramsar.org/RISapp/files/RISrep/RS1656RISformer_190528.pdf)

## 17. Slovakia: Bio-Honey Value Chain, Slovak Mountains

Prepared by Diana Surová (CZU Prague)

### 17.1. Description of Value Chain

Bio honey production is a new niche in the Slovak mountains that follows many innovations. Due to the lack of intensive agriculture and more forests and meadows, the honey gets higher quality in the mountains. Apart from a clean environment, bio honey production requires manual bee panels preparation from local resources, bees winter feeding by their honey, and natural medicines for bees instead of the conventional ones. These conditions result in lower honey yields than conventional production and make bio honey relatively expensive and rare. However, all these novelties simultaneously bring honey production and quality similar to beekeeping in the region at least a century ago.

### 17.2. Rationale for its selection as part of the MOVING project

Maintaining healthy bee populations is crucial not only for bee products for human use but also for pollination of crops, natural flora and preserving biodiversity.

The number of registered beekeepers in Slovakia has been considerably increasing over the last few years. Up to date, bio honey production represents a very moderate proportion of honey production in the country. It may be interesting to learn about this innovative niche in the Slovak mountains for the MOVING project. Vice versa, the project may help improve a network between stakeholders who have been involved in this value chain.

The selected three LAUs in Slovakia (Polomka, Bacúch, Bravacovo) have favourable natural conditions for establishing the apiaries for bioproduction. The area is covered mainly by semi-natural forests and extensive rangelands. Thus, forest trees and other plant species make possible the manufacture of various types of bee honey.



Figure 26: Beekeeping in the three LAUs (Polomka, Bacúch, Bravacovo)

### 17.3. Stakeholders for participatory value chain analysis

The group of stakeholders participating in the value chain analysis will represent a new participatory collaboration with the CZU. First connections with some stakeholders were already done between May – July 2021. During the August 2021 the plan is to introduce information about the project to all relevant stakeholders and exchange with them the visions about the possible benefits of the project to existing or new networks relevant for the value chain development.

Table 18: Stakeholders to be engaged in the Slovak Mountains Bio-honey VC

Stakeholder Types	To be engaged in regional MAP	Other stakeholders
Producer (farmer, forester, grassland manager)	Beekeepers, landowners and land managers including foresters, grassland managers and farmers	Beekeepers from other areas producing bio-honey
NGO	Consumers, Environmental NGO's	
Civil Society	Civic association for local traditions	Regional public-private partnership
Innovation broker/advisor	Entities promoting bio-certification, High school for beekeepers	Key – beekeepers producing bio-honey
Business (agricultural)	Honey – marketing actors and exporters	To be identified
Business (diversified or non-agricultural businesses including processing, distribution, retail)	Regional Retailers (supermarket chains), Rural tourism agency – promoting local products	To be identified
Public authority/policy-makers	Regional Directorates of Agriculture and Forestry Ministry, Natural Parks representatives	Municipalities
Researcher	Research experts in beekeeping Researchers in bio production	Rural development researchers
Other	Regional Development Agency	To be identified

### 17.4. Further information

For more information please contact Diana Surová ([surovad@pef.czu.cz](mailto:surovad@pef.czu.cz)).

## 18. Spain: Betic Systems Organic Olive Oil Value Chain

Prepared by Antonio Zafra, Raquel Moreno, and José R. Guijarro (ADEGUA)

### 18.1. Description of Value Chain

The mountain olive grove represents a significant percentage of the cultivated olive grove area in Southern Europe. It is a traditional system that fulfils critical environmental, economic, and social functions, its survival being at serious risk due to numerous problems linked to its economic profitability, complex management, and physical and pedological characteristics. At the same time, it has begun to be affected by impacts derived from climate change and other problems that have burst into the rural environment, such as depopulation, ageing, or the abandonment of unprofitable agricultural land.

Organic production is presented as an alternative that can alleviate these difficulties and generate specific and integrated solutions in a development model based on sustainability. The Sierras Subbéticas Cordobesas, in the regional context of the Cordilleras Béticas, concentrate a dynamic group of actors in the heart of an emerging Value Chain of Organic Olive Oil. In addition to the problems above, the mountainous characteristics provide opportunities to give a differentiated value to olive oil, based on identity and interaction with the socio-environmental surroundings, generating new activities and renewing others, making this Value Chain more balanced resilient.



Figure 27: Olive Groves in Betic Mountains

### 18.2. Rationale for its selection as part of the MOVING project

In the context of MOVING, the proposal of this Value Chain is justified by the economic, socio-cultural, and environmental relevance that the traditional organic olive grove represents in many



mid-mountain areas of Southern Europe. This olive grove can be, under a sustainable and integrated approach, a model of transition towards innovative agri-environmental practices in mountain areas, as well as a scenario where to show how EU agricultural and environmental policies can be effectively combined to boost successful solutions to the climate change scenario and the multiple crises affecting mountain and rural areas of the EU. Thanks to new or adapted socio-ecological assemblages, the value chain should gain internal consistency and synergies with other sectors of activity.

### 18.3. Stakeholders for participatory value chain analysis

More than thirty people have been identified, with different profiles. The representativeness of the different types of actors, their origin, and their direct relationship with the territory and object of analysis was considered. Whenever possible, an attempt was made to maintain a balance of gender and age among all potential participants. Through a brief telephone contact (15-30 minutes), the MOVING project and the initiative to create a regional MAP were presented. Subsequently, additional information has been sent by email, and most of the contacted persons have confirmed their participation.

The first distribution of MAP members has been made in four groups of origin (Producers and companies; Associations, NGOs, citizens; Organisations, institutions, and research projects; Government and municipalities), keeping a fifth open group of "others" gathering an external group of experts. Similarly, depending on the degree of commitment and availability, MAP members are considered core, active or occasional.

A kick-off activity in the form of an online Kick-off meeting has been developed on 8 July. Due to the summer/holiday period, some members were not able to participate. The aim was to deepen the project's objective, means, and expected results, especially emphasising the role of the actors in a participatory analysis methodology. The participants were invited to introduce themselves, show their expectations, their first vision about the problems affecting the Value Chain and the opportunities they expect the implementation of MOVING to offer, and their contribution and interest in the project.

Table 19: Stakeholders to be engaged in the Betic Mountains Olive Oil VC

Stakeholder Types	To be engaged in regional MAP	Other stakeholders to be engaged in WP4
<b>Organic Mountain Olive producers (6-8)</b>	Owners and managers of different plots	Some other will be interviewed or invited to participate in specific meetings
<b>Organic Olive Oil elaborators (3)</b>	Owners of mills and cooperatives producing organic olive oil in the 3 municipalities	Similar actors from other municipalities will be invited to discuss their views.

<b>Organic Olive Oil distributors (1)</b>	Some local distributors will be involved	Some other located out the 3 focused municipalities might be interviewed
<b>NGO Organic producers and consumers</b>	A local NGO will be involved	
<b>NGO Ecologist</b>	A local NGO will be involved	
<b>NGO Reforestation and environmental activities</b>	A local NGO will be involved	
<b>Farmers Union</b>	Two national farmers unions are represented through local representatives	
<b>Certification body for organic production</b>	The principal entity responsible to certify organic products in the region will be involved in the MAP	
<b>Researchers</b>	Some of them are involved in the MAP (researchers specialized in VC Topics)	Some other specialised on specific topics will be interviewed or invited to specific meetings
<b>Public agency agrarian regional policies</b>	They are involved through 2 local agrarian offices, one representative of the specialised organic production department in the province, one representative of Local Action Group (LEADER) operating in the area	
<b>Public agency agrarian research and training policies</b>	The IFAPA institution will be represented by the Director of center located in the area	
<b>Olive Oil Protected Denomination of Origin</b>	One representative of Priego de Cordoba DOP will be involved	Some other could be invited to participate in specific sessions or interviewed
<b>National association of olive municipalities</b>	The institution will be represented by its general manager	
<b>Municipalities</b>	Three representatives will be involved on behalf the three municipalities of study case area	



<b>Natural Park Management</b>	It will be represented by the General Director	
<b>Agrarian regional public authority/policy-maker</b>	It will be represented by the responsible of organic production in the Cordoba province	
<b>Other (Experts)</b>		

## 18.4. Further information

For more information please contact Antonio Zafra ([azafra@adegua.com](mailto:azafra@adegua.com)).

## 19. Spain: Sierra Morena - Jamón Ibérico Value Chain

Prepared by María del Mar Delgado-Serrano, Sherman Farhad, and Carmen Maestre Díaz (University of Cordoba - UCO - Spain)

### 19.1. Description of Value Chain

Iberian Ham (Jamón Ibérico) - Protected Designation of Origin (PDO) – Los Pedroches is the selected value chain for the Sierra Morena reference region. It is a high-quality product with great embeddedness in the *dehesa* social-ecological-system. *Dehesa* in Spain (or *montado* in Portugal) is a unique cultural landscape and an extensive and integrated agrosilvopastoral system where agriculture, forestry and grazing are combined to deliver goods and services. The PDO protects the quality assurance and ensures the territorial identity of the product. Iberian ham is well known at the national and international levels, and it is part of the traditional food products nationwide. The value chain is key to the sustainability of the *dehesa*.

### 19.2. Rationale for its selection as part of the MOVING project

*Dehesa* as a natural habitat of Iberian pig is a unique agroforestry system that occupies a significant fraction of land surface (around 6 million ha) in the Iberian Peninsula. *Dehesa* is a matrix of several interconnected value chains (e.g., livestock, cork production, and rural tourism). Livestock, including Iberian pig as an indigenous species, is one of the key activities linked to the *dehesa*. Iberian ham value chain represents a significant social-ecological interrelationship between grazers and the oak forests in the reference region and it symbolizes a local and regional identity. However, climate change and grazing intensity among other drivers, are threatening the future of the *dehesa*, the provision of its ecosystem services, and the corresponding value chains like the Iberian ham.



Figure 28: Dehesa (oak forest) in Sierra Morena (Source: MOVING H2020)

### 19.3. Stakeholders for participatory value chain analysis

The process of stakeholder mapping and Multi-Actor-Platform (MAP) creation has been slightly different (faster & more intensive) in the Sierra Morena case study because this reference region serves as a pilot case study for the participatory vulnerability analysis of land systems (Task 3.3). So, during the May-July 2021 period, the UCO Team has been carrying out not just stakeholder mapping for participatory value chain analysis but also intensive field work (15 interviews and a two-day participatory workshop). Sierra Morena virtual MAP Kick-of-Meeting is planned for July 20<sup>th</sup>, but we will devote additional efforts to the meaningful and long-term stakeholder engagement in Sierra Morena during the fall months (Sep-Dec 2021).

Table 20: Stakeholders to be engaged in the Sierra Morena Jamón Ibérico VC

Stakeholder Types	To be engaged in regional MAP	Other stakeholders to be engaged in WP4
Producer (farmer, forester, grassland manager)	Stock farmers in charge of the maintenance of the pig farms. They are usually the owners of the farms but sometimes they rent lands to feed their pigs.	Stock farmers from other localities  Network of women stock farmers
NGO	To be identified	To be identified
Civil Society	Rural Development Group (Grupo de Desarrollo Rural-GDR) as supra-municipal association	Consumer networks  Environmental associations
Innovation broker/advisor	Entities who promote initiatives regarding new labelling and certifications  Administration and research centres, trying different innovative initiatives that are focused on the sustainable management of the <i>dehesa</i>  Key Livestock cooperative of the region promoting E-commerce  Key Livestock cooperative of the region with specific meat processing infrastructure, which lets the cooperative	Administration and research centres, trying different innovative initiatives that are focused on the sustainable management of the <i>dehesa</i>

	export the final product to countries such as US with specific requirements	
Business (agricultural)	<p>Stock farmers who are members of the cooperative and manage their production through this entity</p> <p>Other stock farmers who manage their production through other local &amp; regional businesses and not through the cooperative</p> <p>Small local and regional businesses who manage their own pig farms and sell the final product (Iberian ham) under their own brand and labelling.</p>	To be identified
Business (diversified or non-agricultural businesses including processing, distribution, retail)	<p>Key livestock cooperative of the region who produces, processes, and sells the certified PDO (Los Pedroches) Iberian ham</p> <p>2/ Slaughterhouses</p> <p>3/ Ham curer companies</p>	To be identified
Public authority/policy-maker	<p>1/ Municipalities</p> <p>2/ Natural Park of the region</p> <p>3/ Public administrations (e.g., regional ministries of agriculture and environment)</p>	To be identified
Researcher	<p>1/ Scholars from public academic entities (e.g., University of Cordoba) whose research is focused on the <i>dehesa</i></p> <p>2/ Researchers from research centres associated with the value chain, who work with both private and public funding</p>	To be identified
Others: Certifying authorities	PDO Certification authority	Entities who monitor the process and guarantee the quality of the final product and the corresponding labeling



## 19.4. Further information

For more information please contact Mar Delgado-Serrano & Sherman Farhad ([moving.coord@uco.es](mailto:moving.coord@uco.es); [@H2020Moving\\_UCO](https://twitter.com/H2020Moving_UCO)).

## 20. Spain: Spanish Pyrenees Mountain Wine Value Chain

Prepared by: Antonio Palacios, Cristina Micheloni, Ekaterina Kleshcheva, Gianni Trioli (Vinidea)

### 20.1. Description of Value Chain

The Huesca small vineyards and cellars are all located in the higher part of the mountain and were progressively losing economic relevance, with several cases of abandonment. Lately winegrowers of the lower area (Somontano DO) started to be interested in the Huesca vineyard and offered local vine growers their support in the vineyard and in the cellar, bought their grapes or helped them processing them on site and promote the wines on the market. The interaction between professional wine grower in Somontano and the small-scale producers in Huesca is the key to the value chain success.

### 20.2. Rationale for its selection as part of the MOVING project

Huesca is a historic vineyards region in Aragon. Due to depopulation in last half century, a lot of vineyards were uprooted and now what remains are small productions with identity value. The agro-ecological system is polyculture, each farmhouse in the area maintains a very small winery put at risk by aging of the farm population. In the last decade several professional farmers showed interest in getting engaged into the local highly identified production and offer their knowledge and support to local producers. There is a IGP (indication geographical protected) Ribera del Gállego-Cinco Villas.

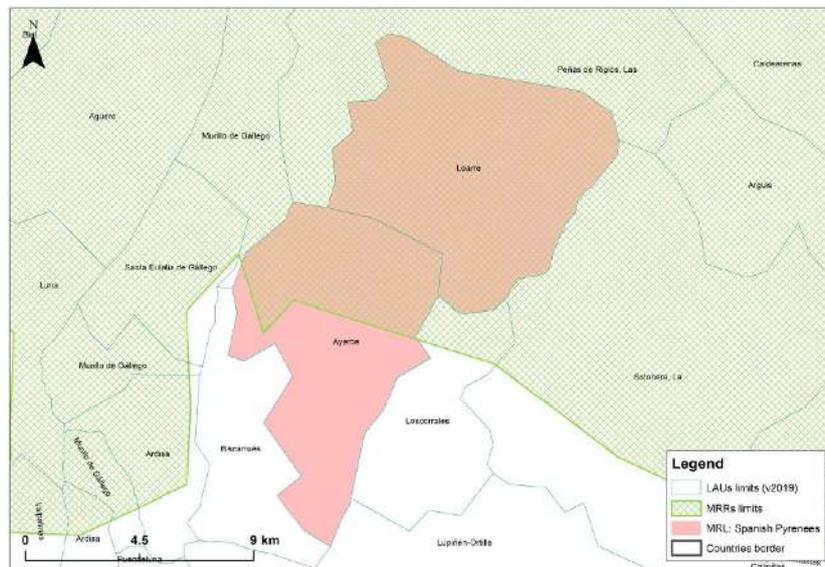


Figure 29: MRL within Spanish Pyrenees MRR (Source : UEVORA)

The main challenges of the value chain are the lack professionalism among small producers, high production costs that can hamper market potentials, climate change and its effect on the ripening cycles of the grapes.

### 20.3. Stakeholders for participatory value chain analysis

Vinidea is contact with the regional collaboration team who is charge of gathering together the value chain actors for participatory value chain analysis. The kick-off meeting and other activities (interviews, meetings, seminars) are programmed after the summer break and harvest activities (late September – October). For now, a preliminary group of stakeholders has been established in order to be involved in forthcoming events.

Table 21: Stakeholders to be engaged in the Spanish Pyrenees Wine VC

Stakeholder Types	To be engaged in regional MAP	Other stakeholders to be engaged in WP4
Producer (farmer, forester, grassland manager)	Grape producers, grape + wine producers+ cellar managers	
NGO	Environmental NGO	
Civil Society	To be confirmed	
Innovation broker/advisor	Advisors (grape) and oenologists	
Business (agricultural)	Wine companies,	
Business (diversified or non-agricultural businesses including processing, distribution, retail)	HORECA, touristic guides	
Public authority/policy-maker	Municipalities	
Researcher	Research station	
Other	To be confirmed	

### 20.4. Further information

For more information please contact Cristina Micheloni ([Cristina.micheloni@vinidea.it](mailto:Cristina.micheloni@vinidea.it)).

## 21. Switzerland: Swiss Alps Grain Value Chain

Prepared by Anna Geiser, Emilia Schmitt, and Isabel Jaisli (ZHAW)

### 21.1. Description of Value Chain

The grain value chain in the mountain area of the canton of Grisons in Eastern Switzerland is emblematic of traditional forms of agricultural practice at high altitudes and innovative approaches to new production methods. The value chain includes all common European grains and is strongly influenced by the establishment of the "GranAlpin" label (certification of origin and organic production), which we will focus on, but not be limited to in this case study.

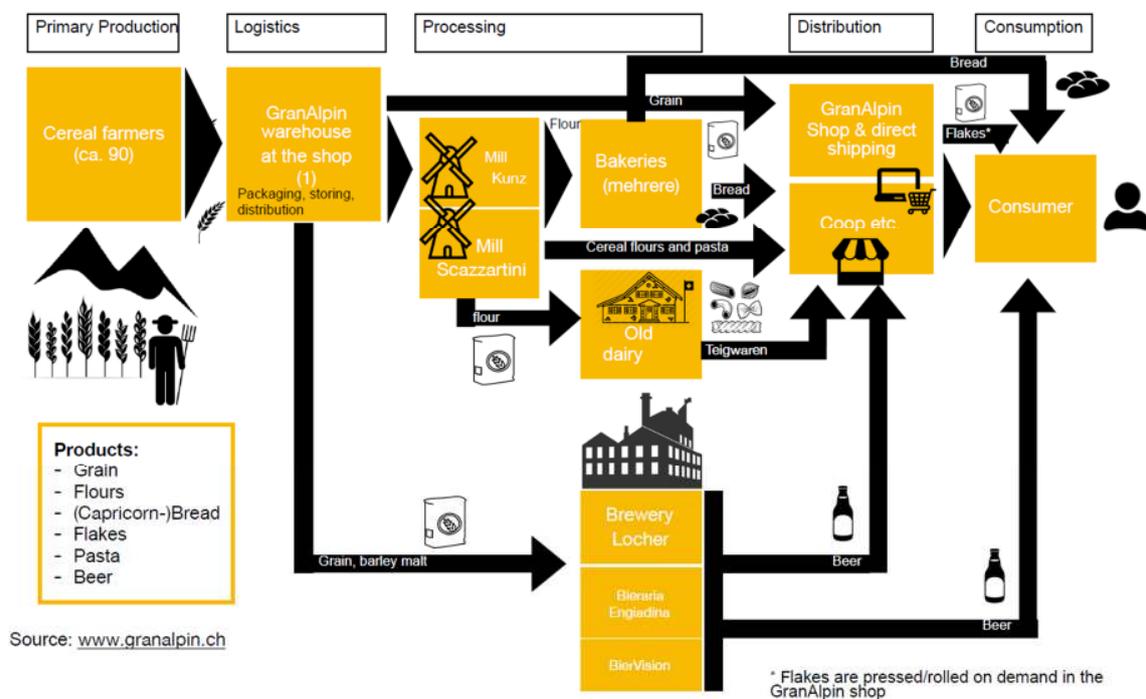


Figure 30: Grain value chain in Grisons, Switzerland (Source: Vukotic, 2017)

### 21.2. Rationale for its selection as part of the MOVING project

The decision for this value chain is based on the desire to find ways to complement traditional animal agricultural production in the region with sustainable plant products. In addition, since mountain farming has been increasingly promoted again by Swiss agricultural policy and the sales channel via the regional brand GranAlpin has been established, farms are growing more cereals again. GranAlpin is a cooperative of Grisons mountain farmers who grow grain in organic quality. The 90 or so members benefit from the distribution of grain products via GranAlpin, as well as from an exchange of knowledge within the network and with external partners. The activities are

coordinated and carried out by an administrative office. In addition to GranAlpin there are some innovative new projects in the region based on grain and cereal products, but the grain is mostly still transported far for processing and there is a lack of local processing facilities, although the interest is there. We believe that this value chain will help to show how innovative projects can accelerate development and are often mixed with originally traditional approaches that are reinvented for current customers.

### 21.3. Stakeholders for participatory value chain analysis

There have been preliminary interviews with potential key stakeholders in order to map the regional network of the value chain. The MAP is currently in the planning stages and a first kick-off activity is planned for Autumn 2021, according to the Corona-situation. The current stakeholder situation appears to be that of rather isolated clusters that could potentially profit from getting in contact with each other.

Table 22: Stakeholders to be engaged in the Swiss Alps Grain Value Chain

Stakeholder Types	To be engaged in regional MAP	Other stakeholders to be engaged in WP4
<b>Producers</b>	Selected cereal/grain farmers (with and without GranAlpin label) and their associations, focus on gender and age diversity	Other relevant farmers and their associations
<b>Businesses (non-agricultural)</b>	Representatives from selected bakeries, breweries, pasta producers, chefs other processors of local grain	Other processors; depending on how we will define “cereal”, this will be the place to engage processors of “cereal-like” crops (e.g. hemp or buckwheat)
<b>Public authority/policy-maker</b>	Selected representatives of the cantonal and communal authorities	Other such representatives
<b>Researcher(s)</b>	Local authority on mountain grain agriculture	If other relevant researchers are discovered
<b>NGO/CSO</b>	Selected representatives of communal, regional, nature park organisations involved in the grain value chain that are non-governmental	Representatives from such organisations that lie outside the MMR but work in similar VCs



<b>Advisors/Innovation broker</b>	Advisors and experts of regional planning and agricultural input, experimental practical researchers (e.g. on farm variety trials)	Representatives from such organisations that lie outside the MMR but work in similar VCs
<b>Civil Society</b>	Interested relevant persons, most of these will also have another role (e.g. NGO, advisor)	Interested relevant persons

## 21.4. Further information

For more information please contact Anna.Geiser ([gess@zhaw.ch](mailto:gess@zhaw.ch)).

- [www.Granalpin.ch](http://www.Granalpin.ch)

## 22. Swiss Jura Tête de Moine Cheese Value Chain

Prepared by Sirine Johnston (ORIGIN)

### 22.1. Description of Value Chain

The *Tête de Moine* cheese is a Protected Designation of Origin (PDO) semi-hard cheese made from cow's milk. It is a niche product with a unique consumption. It is consumed in the form of a “rosette”, made with an accessory called a “girolle” which allows the cheese to be scraped finely.

### 22.2. Rationale for its selection as part of the MOVING project

This value chain was first selected due to its innovative nature. Indeed, faced with the significant drop in the price of milk in Switzerland, the actors were able to organize themselves and develop a PDO and a unique mode of consumption, making it possible to create value within the territory. In addition, the value chain is based on pasture-based dairy production, which represents the main area of agricultural use in the country. Wooded pastures, representing historical pasture management in the Jura mountain, predominate in the region and could help limit the negative impacts of summer drought due to the shade that helps maintain humidity. On the other hand, the trees present suffer greatly from the drought threatening the maintenance of wooded pastures. It is therefore interesting to understand how this territory has been able to bounce back from economic threats and also how it can adapt to current threats caused by climate change.

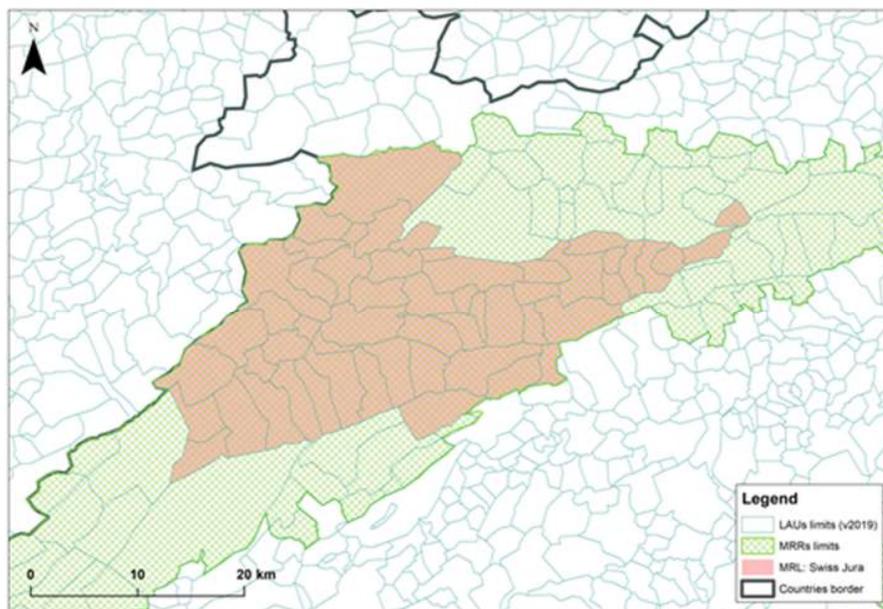


Figure 31: Tête de moine cheese production area (Source : UEVORA)

## 22.3. Stakeholders for participatory value chain analysis

The interprofessional association was contacted and confirmed interest and participation in the project. A meeting with the "Filière alimentaire et Espace rural" section of the Fondation rurale interjurassienne (FRIJ) has been organised for the end of the summer in order to discuss the value chain actor's map and to put us in contact with the relevant stakeholders.

Table 23: Stakeholders to be engaged in the Swiss Jura Tête de Moine Cheese VC

Stakeholder Types	To be engaged in regional MAP	Other stakeholders to be engaged in WP4
Producer (farmer, forester, grassland manager)	A total of 237 dairy farms supply the milk for cheese making. We aim at meeting a representative sample of the diversity of farms.	
NGO	Various NGOs work in the area on nature and environmental protection such as WWF Jura and Pro Natura Jura.	The Swiss Ornithological Institute is a foundation whose aim is the protection of birds and therefore carries out a number of projects related to their habitat, often taking place in rural areas and on farms
Civil Society	Suissemelio is a Swiss association for rural development which aims to maintain and develop structural improvements, agricultural credits and social support measures, taking into account regional particularities.  The Parc du Doubs is a regional nature park of national importance and aims to preserve the habitats and ecological wealth of the park and in particular the wooded pastures, linked to milk production.	Various organisations directly influence food production and consumption in Switzerland such as Slow Food, the Taste Week, the Swiss Culinary Heritage, all of which aim to promote local food cultures and traditions of high quality and taste.  Furthermore, farmers' cooperatives such as Fenaco and the Fair Milk Cooperative defend the interests of producers and the resilience of farms.
Innovation broker/advisor	Agricultural adviser of the canton of jura	AGRIDEA is the national agricultural extension centre and tries to network and create

		synergies between the players in the agricultural and food industry.
Business (agricultural)		There are two major organic labels in Switzerland (Demeter and BioSuisse) and the Protected Designation of Origin(PDO) and the Protected Geographical Indication(PGI) who identify Swiss products that are produced in their region of origin using traditional methods who influence agricultural production due to their requirements specifications.
Business (diversified or non-agricultural businesses including processing, distribution, retail)	<p>The actors involved in the processing, refining and organisation of the sector will be questioned: 9 cheese dairies, 2 refiners and the Interprofession of the Tête de Moine cheese.</p> <p>There are two main large retailers (migros, coop) and several small retailers in the region. Direct sales are also made through some of the cheese dairies.</p>	A significant part of the production is exported outside Switzerland, in particular to Germany and France, involving other distributors and stakeholders who enable this export.
Public authority/policy-maker	For the canton of Jura, two cantonal public authorities deal with agricultural and spatial planning issues: Fondation rurale interjurassienne (FRIJ) which is the main instrument for rural development in the Jura and Bernese Jura. Its main tasks focus on training and advice in the main areas of rural development and the Jura department of spatial planning	The Federal office for Agriculture (FOAG) and the Federal Office for the Environment (FOEN) are the Confederation's competence centre for all core issues relating respectively to the agricultural sector and the environmental sector.
Researcher	The FRIJ develops a number of projects and contributes to research in the study area,	Three research institutes are specialised in topics related to agriculture and forestry: School

	currently focusing on sustainable and efficient milk production.	of Agricultural, Forest and Food Sciences HAFL; Agroscope and the Swiss Federal Institute for Forest, Snow and Landscape Research (WSL).
Other	AgriJura is the the umbrella trade union association for agriculture.	<p>Two major organisations represent the interests of farmers:</p> <p>Uniterre is one of the strongest agricultural unions in Switzerland, fighting for the interests of farmers as well as for an environmentally and animal-friendly agriculture in order to sustain a local and nourishing agriculture in Switzerland.</p> <p>The mission of the Swiss Milk Producers' Federation (SLP) is to ensure the best possible political and economic framework conditions for milk producers.</p>

## 22.4. Further information

For further information please contact Sirine Johnston ([sirine.johnston@origin-for-sustainability.org](mailto:sirine.johnston@origin-for-sustainability.org))

- <https://www.tetedemoine.ch/fr/>

## 23. Turkey: Beydaglari Tomatoes

Prepared by Murat Yercan, Hakan Adanacioğlu, Duygu Tosun, and Filiz Kinikli (EGE )

### 23.1. Description of Value Chain

Value chain is greenhouse tomato cultivation in Beydağlari (MRR). Greenhouse farming is carried out generally in the sea level plain but in recent years it is extended to mountain areas like Beydağlari (MRR). This provides a sustainable production and trade in all over the year mostly export oriented production.

The LAU (Elmalı) has the highest annual total sunshine duration. In addition, the air is cool and dry because of high mountain region. Both the high annual sunshine duration and the favourable climatic conditions played an important role in the development of greenhouse cultivation in Elmalı (LAU). Especially greenhouse tomato cultivation is very common in the region. Due to the favourable conditions in the region, greenhouse tomato producers produce higher quality tomatoes compared to the producers located in the plain. Tomatoes produced in greenhouses in Elmalı (LAU) have a better appeal than those grown in the plain.

### 23.2. Rationale for its selection as part of the MOVING project

Disease and pest density is low in the region due to climatic and topographic factors. Therefore, less pesticides are used. Using less input increases the income of producers. In addition, greenhouse tomato growers in Elmalı (LAU) produce higher quality tomatoes than the ones in the plain. Quality tomato production provides an opportunity for tomato growers to obtain high prices for their products. The price advantage in the product positively affects the producer income. As a result, greenhouse areas have increased rapidly in recent years in Elmalı (LAU) as greenhouse cultivation activities provide high income. In addition, healthier products are supplied to the market due to the use of less pesticides. Greenhouse farming is more resilient against the climatic risks comparing with the open field farming. The most of the conditions in greenhouses is under control such as humidity, temperature, lighting and pest and diseases.

The most common marketing channel used by greenhouse tomato growers is the wholesale markets brokers. The traders are used moderately in product sales. The direct to consumer sales are low. The greenhouse tomato growers sell to exporter companies less frequently. On the other hand, the fact that the tomato produced in Elmalı (LAU) is a highland product creates a positive effect in terms of the product's value chain. As a matter of fact, tomatoes grown in the highland have a higher quality and healthier product image.



Figure 32: Greenhouse areas in the LAU (ELMALI)

### 23.3. Stakeholders for participatory value chain analysis

First connection with the stakeholders will be done at the beginning of the August 2021. In this visit some introductory information about MOVING will present to all related stakeholders in the area. So far, the communication was done by virtual with them for collecting the data about the MRR, MRL, LAU and selected value chain.

The most important actors in the area are Regional Directorates of Agriculture and Forestry Ministry, LAU Municipalities and Chamber of Farmers.

Table 24: Stakeholders to be engaged in the Beydaglari Tomatoes VC

Stakeholder Types	To be engaged in regional MAP	Other stakeholders to be engaged in WP4
Producer (farmer, forester, grassland manager)	Greenhouse tomato growers	Apple and grape growers
NGO	Chamber of Farmers	Farmers association
Civil Society	Regional environmental protection foundation	Consumer association
Innovation broker/advisor	Chamber of agricultural engineers	Chamber of forestry engineers

Business (agricultural)	Exporters Association The Organization of Wholesale Fruit and Vegetable Markets	Agricultural cooperatives
Business (diversified or non-agricultural businesses including processing, distribution, retail)	Regional Retailers (supermarket chains)	Warehouses, Logistics
Public authority/policy-maker	Regional Directorates of Agriculture and Forestry Ministry	Municipalities
Researcher	Agricultural engineers working in agricultural research institutions in the region	Researchers at the regional University, School of Agriculture
Other	Regional Development Agency	Chamber of trade

## 23.4. Further information

For further information please contact Murad Yercan ([murat.yercan@ege.edu.tr](mailto:murat.yercan@ege.edu.tr)).

- Figure source: Başbuğ, T. 2016. Analysis of Production Cost and Profitability of Greenhouse Growing Enterprises: A Cases of Elmalı County of Antalya Province. M.Sc. Thesis. Süleyman Demirel University Graduate School of Applied and Natural Sciences, Department of Agricultural Economics, Isparta, Turkey.



## 24. UK Scotland – Speyside Malt Whisky Value Chain

Prepared by Kirsty Blackstock with inputs from Rachel Creaney, Sharon Flanigan, Jon Hopkins and Keith Matthews (James Hutton Institute)

### 24.1. Description of Value Chain

Scotch Whisky (PGI) accounts for around 75% of Scotland’s food and drink exports<sup>2</sup>. Malt Whisky is the name given to whisky made from malted barley (rather than other carbohydrates); and single malts (premium products) come from individual distilleries. Speyside is one of five Scotch Whisky regions defined by the Scotch Whisky Association, and the area with the highest concentration of distilleries. Although the malt whisky brands are generally localised to specific distilleries, many distilleries are owned by multi-national corporations such as Diageo or Pernod Ricard and Scotch whisky is an important global value chain.

### 24.2. Rationale for its selection as part of the MOVING project

The economic argument is covered above. While some barley is grown and malted locally, with some relocalisation going on, the whisky VC is also tele-coupled with other barley producers in the rest of UK and Europe and also relies on local and international barrels (including sherry and wine casks). Malt Whisky is also an interesting case in terms of socio-ecological systems. The distilleries are historically located due to a combination of access to water, peat and transport networks. The Speyside whiskies rely on water from the River Spey for whisky manufacture in terms of water quality and in terms of quantity as water is required for cooling. The River Spey and its tributaries have been subject to water scarcity in the past, and this is projected to worsen in climate change projections. Some distilleries are investing in Nature-based Solutions such as natural water retention measures and peatland restoration upstream. Malt whisky is also a cultural product, and distilleries use destination imagery in their promotion. The value chain is therefore also interlinked with local tourism and distillery visitor centres are the third most visited attraction in Scotland. Whisky by-products are used as soil fertiliser and feed for local livestock farming, although some of these by-products are now being diverted for renewable energy production. There is ongoing interest in how to enable the economic benefits of whisky production, tourism and livestock production to be maintained and invested locally, rather than flowing to the urban centres in Scotland and beyond. Finally, the VC case can help illustrate the benefits of taking an integrated capitals’ approach to a Green Recovery, looking at natural, human, social and economic capital assets in the region<sup>3</sup>.

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<sup>2</sup> Scotch Whisky Association (2018) Scotch Whisky Economic Impact Report, <https://www.scotch-whisky.org.uk/media/1591/final-2018-economic-impact-report.pdf>

<sup>3</sup> Advisory Group on Economic Recovery Report (2020) <https://www.gov.scot/publications/towards-robust-resilient-wellbeing-economy-scotland-report-advisory-group-economic-recovery/>

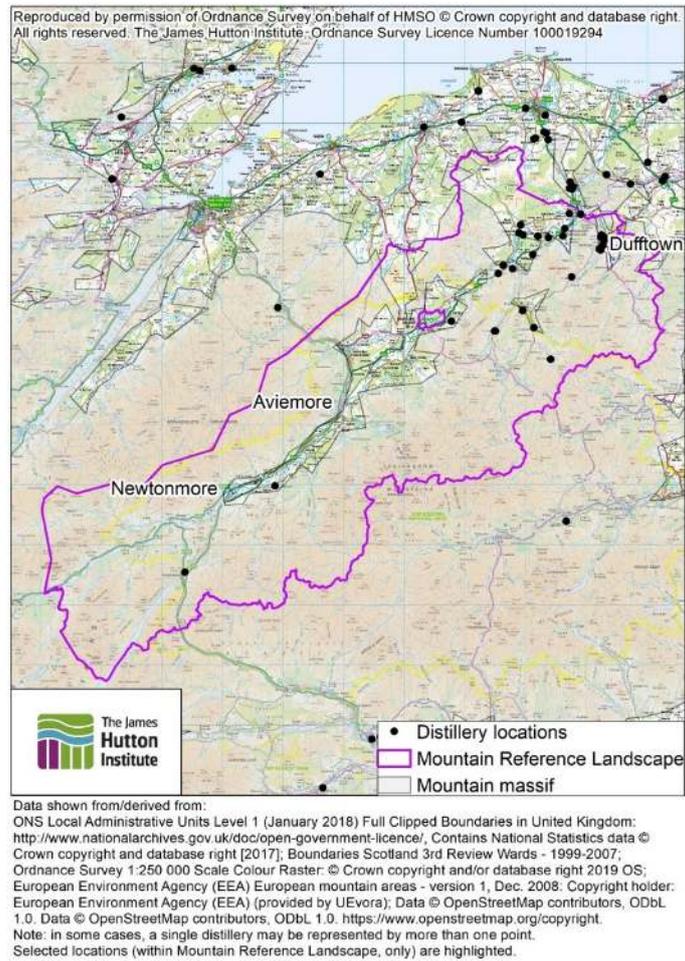


Figure 33: Map showing distilleries in MRL (Source: Hutton)

### 24.3. Stakeholders for participatory value chain analysis

Stakeholder analysis (following the guidance provided by the engagement support team and using the typology being implemented in our monitoring and evaluation of the MOVING Community of Practice) was carried out during April and May. Core members of our regional MAP were identified, and a first meeting held on 20<sup>th</sup> July 2021. Note that we are using the terminology Stakeholder Advisory Group, as this is more familiar language in the UK. Although the area has strong stakeholder networks, an online poll launched during the meeting showed that there was no existing forum duplicating the group's remit; and not all the members were already known to each other.

Table 25: Stakeholders to be engaged in the Speyside Whisky VC

Stakeholder Types	Engaged in Stakeholder Advisory Group (Core Stakeholders)	Other stakeholders to be engaged in WP4 (Active and Associated)
<b>Producer (farmer, forester, grassland manager)</b>	Farmers Organisation, landowners Organisation, individual land managers	Spey Catchment Initiative
<b>NGO</b>	Rural Youth organisation	Environmental NGO umbrella organisation
<b>Civil Society</b>	Community Councils, Local rural development officers	Young people working in associated VC e.g. tourism
<b>Innovation broker/advisor</b>	See public authority below <sup>4</sup>	Carbon code certification consultants
<b>Business (agricultural)</b>	Agri-Tourism operators	Maltsters
<b>Business (diversified or non-agricultural businesses including processing, distribution, retail)</b>	Distillery operators, Tourism operators, Trade association	Biofuel operators, Cooperage (barrel makers), Transport firms
<b>Public authority/ policy-maker</b>	Enterprise (Economic Development) Organisation, Environmental Agency, National Park Authority	Natural Heritage Organisation, National Water Company, Agricultural payments and regulation body, Skills and training agency
<b>Researchers</b>	Mountain SES expert, Rural Policy expert	Water and peatland experts
<b>Other</b>		PGI advisors to Scottish Government, Tourists

## 24.4. Further information

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<sup>4</sup> The majority of business, agricultural and environmental advice in the region comes from the National Park or other state agencies.



- Project website: <https://www.hutton.ac.uk/research/projects/moving-mountain-valorization-through-interconnectedness-and-green-growth-2020-2024>



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